

# The Episcopal Church

Reports to the  
78<sup>th</sup> General Convention  
*otherwise known as*  
The Blue Book



Reports of the Committees, Commissions, Agencies, and Boards to  
The General Convention of The Episcopal Church  
Salt Lake City, in the State and Diocese of Utah  
June 25-July 3, 2015

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Easter tide A.D. 2015

To the Deputies and Bishops of the 78<sup>th</sup> General Convention,

One of the remarkable aspects of the present triennium is that reimagining and restructuring the Church for fruitful engagement with God's world is already well underway. Everywhere I go, I observe and experience lay and ordained leadership exploring adaptive paths for mission – and with a great deal of creativity, hope and determination.

Such leadership is not without cost. Encouraging new ways of working together, building networks, adopting emerging technologies with limited capital, calming anxiety amid change and unfamiliarity: this kind of leadership is a far remove from the application of experience and best practices that served us faithfully in the past. It can be met with resistance, puzzlement, or apathy. Fortunately, it can also be met with encouragement and even enthusiasm – and that is where I am seeing the first fruits of the Church's transformation.

In considering the work of the Church's committees, commissions, agencies, and boards this triennium, some have observed that many of them appear to have had a slow start. Some CCAB members have seemed less engaged. Follow-through can be challenging. Some have had difficulties in adapting to the reality of fewer face-to-face meetings. These observations have merit, and addressing such concerns has been central to my inaugural work as Executive Officer. But I am encouraged by what I have seen and experienced: many faithful Episcopalians are working tirelessly and selflessly for God's mission, confident that transitions can be transformative, and not merely marking time. This triennium, with all its complexities, continues the Church's incarnational tradition of creative engagement with the changing realities of life. I believe you will find much in *The Blue Book* that demonstrates such creative engagement, as well as the faithfulness of The Episcopal Church in proclaiming the Good News of Jesus Christ.

With my prayers, and in thanksgiving for your faithful service,

**The Reverend Canon Dr. Michael Barlowe**  
*Executive Officer*

*The Episcopal Church Center + 815 Second Avenue + New York, NY 10017 USA*



## Acknowledgements

Although preparation for the triennial gathering of the Church at General Convention is but a part of the work of the extraordinary staff of the Executive Office of the General Convention (GCO), one of the first things I was told when I arrived was that the closer we get to General Convention, the more like a NASA “Mission Center” it becomes. That seems to be true – especially in the excitement and challenges of coordinating the many strands, pieces, and processes that come together to support the Church’s collective decision-making and discernment of God’s call. In the past months, the GCO has been abuzz with software testing, survey development, *Blue Book* preparations and editing, contract negotiations, hotel and volunteer coordination, and a thousand and one other activities that come together to prepare our Church for a time and space where the Spirit can freely move.

As we gather in Salt Lake City, I hope you will join me in thanking the extraordinary staff of the General Convention:

- Marian Conboy, Executive Assistant/Deputy for Legislation
- Patrick Haizel, Manager for Finance and Meetings
- Lori Ionntiu, Director of Meetings and General Convention Manager
- Iris Martinez, Administrative Assistant
- Brian Murray, Staff Assistant for Meetings
- Twila Rios, Staff Assistant for Content Management and Digital Publishing
- Stacey Chambers, Digital Publications Editor and Blue Book Editor

I would also like to thank Mark Duffy, the Canonical Archivist of the Episcopal Church, and the entire staff of the Archives, for their tireless work in support of the General Convention, its officers, and its many activities; and Gregory Straub, whose devotion to the General Convention as its Executive Officer and Secretary laid a firm foundation for our upcoming work in Salt Lake City.

Finally, to our presiding officers; to the members of our Commissions, Committees, Agencies, and Boards; and to the talented staff of The Episcopal Church: thank you for your creativity, energy, faithfulness, and commitment to the work of the General Convention. May God continue to bless you and the ministry and mission we share.

**The Reverend Canon Dr. Michael Barlowe**  
*Executive Officer*

*The Episcopal Church Center + 815 Second Avenue + New York, NY 10017 USA*

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# BOARD FOR TRANSITION MINISTRY

## Membership

The Rt. Rev. Barry Beisner, *Chair*, 2015  
Canon Karen Olsen, *Vice Chair*, 2015  
The Rt. Rev. Laura Ahrens, 2015 (*resigned*)  
Mr. Paul Cooney, 2018  
Ms. Susan Czolgosz, 2018 (*resigned*)  
The Rt. Rev. Scott Hayashi, 2015  
The Rev. Canon José McLoughlin, 2015  
The Rev. Canon Ann Normand, 2018 (*resigned*)  
The Rev. Canon Anne Reed, 2015  
Ms. Lynn Schmissrauter, 2015 (*resigned*)  
The Rt. Rev. Kirk Smith, 2018  
The Rev. Canon Stuart Wright, 2018  
The Rev. Victoria Duncan, *Program Officer/Missioner for Transition Ministry, Office for Transition Ministry (until Dec. 2013)*

### *Changes in Membership*

Appointed to fill vacant board positions:

The Rt. Rev. Anne Hodges-Copple, 2018  
The Rev. Canon James Pritchett, 2018  
Ms. Judy Stark, 2015

### *Representation at General Convention*

Bishop Barry Beisner and The Rev. Canon James Pritchett are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** The core purpose of Transition Ministry is the renewal of the Church for more effective mission and ministry through facilitating leadership transitions with the guidance of the Holy Spirit. We all know transition happens whether or not there is a structured, facilitated approach. The Board for Transition Ministry (founded as the Church Deployment Board in the 1970s) is expected to oversee the provision of confidentiality and to present an impartial image in the transition process.

Each diocese's faith communities are the front line of mission and ministry — with clergy being invited to increase that capacity. Bishops and transition ministers serve as resources to them; and likewise, church-wide structures serve as resources to the dioceses — all relying upon the discerning work of the Holy Spirit.

**Meetings:** During this triennium, the Board for Transition Ministry has met twice in face-to-face gatherings and via teleconference quarterly.

During this triennium we reviewed historical documents and continued conversations with the management team of the DFMS regarding the role and place of the Board in relationship to the staff. In the first 18 months of this triennium, under Victoria Duncan's leadership, technical 'fixes' to the online Transition Ministry Portfolio occurred, and developmental enhancements were explored and scheduled with the Portfolio developer, Rayogram. With Tori's departure from the staff in December of 2013, the enhancements were put on hold.

Following the outline of the strategic plan developed during the last triennium and updated in November 2012 and November 2013, task groups have addressed such topics as leadership development, networks and collaborative relationships, and trend analysis. The task group that focused on relationships with other judicatories learned that the Evangelical Lutheran Church in America (ELCA) is looking to TEC as an example of a church-wide database and clergy mobility system.

Due to the need to clarify roles and responsibilities with the management team of DFMS, an additional task group was formed to create a memorandum of understanding, and BTM members were assigned to the search committee for the position of Acting Missioner for Transitions. We have and are collecting many resources regarding social trends and transition, which will be made available to the transition community.

The BTM collaborated with the EC Committee on the Status of Women and with the Office of Pastoral Development in the fulfillment of Resolution A143 (Develop a Search ToolKit To Assist Women Clergy). The Task Force has secured a permanent online home for its materials at [episcopalchurch.org](http://episcopalchurch.org), with cross-referencing from the Office for Transition Ministries web page. The Office for Communications at the Church Center has pledged its support and technical expertise. Additional information will be forthcoming in March 2015.

As part of our work, we reported the following recommendations to the Executive Council and TREC:

1. Retain an Office for Transition Ministry at the church-wide level that maintains a confidential database, equips Bishops and Transition Ministers with creative tools and best practices, and encourages networking within and between dioceses and provinces.
2. Retain some kind of General Convention authorized body that serves in either an oversight or advisory capacity to the Office that determines strategic tools and keeps transition ministry an open process to all who can participate. Whether it is a Board or Standing Commission or Committee — or some other name or function that may yet be determined — we believe that the relationship between Office and Board (as it exists) has been an excellent model for that which HAS been working, as members are practitioners in the field and have both expertise and passion for transition ministry.
3. Eliminate ambiguity of reporting structures: This could happen by clarifying the current interpretation of canons or by creating new canons that codify the desired functioning. Clear structure is critical in order to leave room for the Holy Spirit to interweave flexibility and creativity.
4. We believe that a program officer or missioner's ability to have the resources of some kind of a board or commission (a body of people with expertise and passion) is to be considered for all other ministries within the church-wide system. It allows the system to be broad and trusted, with ongoing and ever-changing resources, networking, and imagination.

Leadership Transitions offer critical opportunities in the life of the Church — whether the transition be church-wide, diocesan, or in local faith communities — for reengagement with the Gospel and Christ's mission.

The Board for Transition Ministry lists the following core principles as necessary for Transition Ministry to be effective: assuring that each context and culture can freely contribute to and access information during the transition process; guaranteeing confidentiality of individual's information; lifting up the Gospel and service with Jesus Christ; focusing on Mission; strengthening role of Bishops in call and placement practices; creating safeguards for justice and fairness in the system; having a church-wide view and not only a diocesan or faith community view; addressing clergy dissatisfactions in placements; dissuading any and all “-isms” (racism, sexism, ageism, etc.).

Historically, the premise behind the inception of the Church Deployment Board (now the Board for Transition Ministry) was that it could be a body “outside the system” (815/management), but “inside the

transition world” (elected bishops, clergy, and lay people from the wider Church) that might better be able to guarantee the sense of confidentiality and independence that all people using the system need to trust.

**Success in Transition Ministry is satisfying Christ's mission:** Transition Ministry is best accomplished by collaborating with our partners with a focus on the local context, the flexibility of process, and a feasibility based on knowing that God provides all that we need. Transition Ministry is characterized by the four “Cs” identified by TREC:

**Catalysts** — Responding to the movement of the Holy Spirit utilizing built-in feedback processes *resulting* in characteristics of success and in spiritually centered, healthy, joyful, hopeful, fearless, empowered leaders, faith communities, and dioceses.

**Connectors** — *Facilitating* collaboration at all levels; integrating with Commissions on Ministry and other ministry and leadership formation groups; and *expecting* full participation of all nine provinces, Episcopal search teams, bishops, clergy, and laity with the church-wide tools of transition ministry.

**Capability Builders** — *Inviting* all the baptized to full participation in ministry; *developing* leadership capacity; and *forging* a strong commitment to, and passion for, Christ's mission through the Church and wider community.

**Conveners** — *Supporting* local faith communities by *equipping* their leaders with tools, networks, and resources to identify and satisfy the needs of the wider community.

The Board for Transition Ministries has continued to work with its partners (faith communities through vestries and search committees; clergy; dioceses through bishops, diocesan transition ministers, and commissions on ministry; the Presiding Bishop, DFMS management, other CCABs, and General Convention) to communicate meaningful information and best practices in the transitions in the Church. We anticipate continuing to develop and enhance the resources and tools used in transition ministry, and continuing to serve as a conduit for innovation and best practices throughout the Church.

## Budget

The BTM has operated effectively within its budget of \$16,000 this triennium. Most expenditures were related to a November 2013 in-person meeting held in Houston, Texas; and to the use of a consultant for strategic planning. For 2016-2018 the Board hopes to have two in-person meetings, in addition to regular meetings utilizing online meeting technology; this will require \$13,000 for 2016, \$1000 for 2017, and \$13,000 for 2018, for a total of \$27,000 for the triennium.



# BOARD OF THE ARCHIVES OF THE EPISCOPAL CHURCH

## Membership

The Rt. Rev. J. Neil Alexander, *Chair*, 2015  
The Rev. Jennifer Baskerville-Burrows, *Vice Chair*, 2015  
Ms. Jeannette Huey, *Secretary*, 2015  
Mr. Mark J. Duffy, *Canonical Archivist, Ex Officio*  
Ms. Patricia Abrams, 2015  
Ms. Anne Bardol, 2015  
Ms. Kay E. Bishop, 2018  
The Rev. J. D. Godwin, 2015  
Mr. Lawrence R. Hitt II, 2018  
The Rt. Rev. Gary R. Lillibridge, 2018  
The Hon. Byron Rushing, 2018  
The Rev. Robert L. Sessum, 2018

### *Representation at General Convention*

Bishop Neil Alexander and Deputy Jennifer Baskerville-Burrows are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** The Board of Archives directs the Church's archives and records program and the Canonical Archivist who is charged to manage and care for current and future historical records of the General Convention, the DFMS, and the wider Episcopal Church. The Board reviews, approves, and recommends policy to the Executive Council and establishes goals for the Archives that strengthen the mission priorities of the General Convention.

**Meetings:** In this triennium, the full Board met twice in person, and the executive committee met in conference six times. The Board gave close attention to its structural relationship to the General Convention and the DFMS, participated in the budget visioning process for the 2016-2018 triennium, further explored an archival facility in Austin for The Episcopal Church, and advocated for an electronic records repository and e-archiving system that could eventually benefit the wider Church.

### **Strengthening Governance Relationships**

The Board devoted a certain amount of its time to the question of how to best position the Archives to sustain its historical mission in the future, create a viable basis for fund-raising, and share a sense of ownership of the Archives by the whole Church. We considered for several years the goal of sustainability, which would translate into a reduced demand on the budget, especially in the necessary areas of physical plant and storage.

The big picture challenge for the Church is how best to elevate the Archives' profile as a giving opportunity and to shape its organizational identity as both a religious and national cultural asset that could leverage major gifts, foundation grants, and other restricted funds. The General Convention's authorization in resolution 2006-A143, reaffirmed in 2012-A162, to establish a second, foundation-type, 501(c)(3) DFMS subsidiary received the Board's careful consideration and unanimous support with the receipt of independent legal counsel's review. The proposal assured a governance relationship in which full control over property and general direction could be retained by the parent organization, the Domestic and Foreign Missionary Society (DFMS). The Society's management expressed its inability to support this development at this time, however, and counseled the Board on its limited authority to create a new or separate legal entity.

With General Convention's call to envision new structures for The Episcopal Church, the Board agreed to suspend further action to incorporate a 501(c)(3) subsidiary until the future organization of the Church and the Board's place in it are clearly understood. The Board took time to reconsider its own place within the structure of the General Convention and the DFMS.

We note one salient difference between the Archives and other separately incorporated agencies of The Episcopal Church. As the canonically authorized custodian of The Episcopal Church's official records, the Archives and its Board have a concrete legal connection to the DFMS and the General Convention. The Board recognizes its unique oversight responsibility to provide direction, accountability, and the highest possible standards of practice for the work of the Archives. With that assignment in mind, the Board regularly reviews the measures of impact and service, which are very high in quality, because they are the product of the committed but neutral management of the Church's records by professional archivists.

The Board periodically reports to Executive Council and is represented by the Archivist in his regular attendance at Council meetings, where he reports to the Standing Committee on Governance and Administration (GAM) and is available as a ready information resource. The Rev. Jennifer Baskerville-Burrows presented the most recent Board report to Council on February 6, 2014, which was well received and gave rise to Council's vote to press forward with a solution to the ongoing facility issue. The Board reaffirms the role of the Archivist and the staff as DFMS employees, who follow personnel guidelines in all matters and support the administrative and mission goals of the Executive Council and the Society.

The Board endorses the view that the historical integrity of the Church is wrapped up in the future of the Archives as a constant component within the flux of institutional change. The idea of subsidiarity is contained in its governance model in which the Board and the Archivist retain sufficient professional autonomy to conduct their mission faithfully but with full accountability. The Canons of the Church show that a great deal of thought has gone into the importance of the Archives and the structure that best supports the needs of the Church.

### **Toward a New Archival Repository**

With this report we mark 10 years since the Board, the staff, and four Executive Council committees have developed plans for the construction of an Archives repository for The Episcopal Church. We now find ourselves in early 2015 at a promising decision point on the downtown Austin site that was purchased by the DFMS in 2009 as a potential location for the Archives. Even as we continue to explore this prospect, however, the Board has concluded that this round of investigation must be the final one for this particular site.

The final report of the last Strategy Committee to the 2012 General Convention was the result of some extraordinarily good work led by the Chair, Dr. Joel Cunningham of the University of the South. The Committee produced several excellent recommendations, but the most critical piece — a budget request of \$730,000 for a targeted fund-raising effort — did not pass the budget committee of General Convention. A plan for even the most modest archives building is moot without a vehicle for local fund-raising. The ambivalence that followed that decision created a hiatus that gave the Board, Executive Council, and management time to mull over other possible alternatives.

In particular, Bishop Stacy Sauls as COO asked the Archives Board to accept some delay to allow the Council to consider the use of DFMS property in a more general way. In February 2014, Executive Council gave permission for the sale of the Austin property if that were preferable to maintaining the revenue-generating lot, which has produced income against principal, but also carries a debt liability that may prevent other prudent investments by the Society. At the same February meeting, the Executive Council's Advocacy and Networking for Mission, taking a keen interest in the Archives as an important source of history on mission,

social justice, and advocacy efforts, successfully urged Council to establish the ANo25 Committee to monitor progress on an Archives building.

Following these votes in early 2014, The Rev. Lang Lowrey and his firm, The Verta Group of Atlanta, were hired by the DFMS to look at the possibilities for developing the property or selling it outright. Mr. Lowrey met at length with the Board in November 2014 and gave an early, positive assessment of the prospects in Austin. He assigned an estimated appreciation of at least 20 percent in the value of the land since purchase, and described the increased desirability of the site adjacent to a major urban-redevelopment area, despite the known building limitation of a protected capitol view corridor.

As of this writing, the Board awaits the outcome of negotiations to proffer the land to a willing developer in exchange for an in-kind ownership transfer of an Archives building within the development. If these negotiations are unsuccessful, the alternative is an outright sale of the land and the possible commitment of the profit to a new and very different Archives plan. The DFMS Development Office has begun to anticipate fund-raising approaches to the new downtown Austin model. The result of these efforts should be known by the time General Convention meets in Salt Lake City.

### The Future Archives

For almost as many years as the Board has contemplated a physical repository, it has made successive requests of General Convention to fund the development of an electronic records acquisition program. With the support of the Executive Council and management, that reality has come to fruition in this triennium with the allocation of seed money for 2014 and 2015 to purchase hardware and software that will help the archivists reach this priority goal. The investment in technology affirms that the paperless future will not be accompanied by a loss of the Church’s institutional history. The Board is confident that The Episcopal Church’s digital repository will eventually serve the wider Church as bodies look for a trusted source for securing vital and historical records that exist on their own information networks.

### FINANCIAL REPORT FOR THE 2013-2015 TRIENNium

#### Archives/Records Management Expenses

	2013 Actual	2014 Estimated	2015 Projected	Total Projected
Salaries and Benefits (estimated)	\$ 627,784	\$ 704,844	\$ 754,044	\$ 2,086,672
Rent, Facilities, Storage	59,675	60,800	63,000	183,475
Information/IT Services	24,200	20,450	20,450	65,100
Digital Archives/Electronic Records	94,450	80,977	130,977	306,404
Operations	58,793	97,044	63,073	218,910
<b>Total</b>	<b><u>\$ 864,902</u></b>	<b><u>\$ 964,115</u></b>	<b><u>\$ 1,031,544</u></b>	<b><u>\$ 2,860,561</u></b>

#### Board of the Archives Expenses

	2013 Actual	2014 Estimated	2015 Projected	Total Projected
Board Meetings	\$ 244	\$ 23,583	\$ 0	\$ 23,827

### GOALS AND OBJECTIVES FOR THE 2010-2012 TRIENNium

It was in the midst of the budget visioning process of Executive Council that the two primary concerns of the Archives Board and the curators — securing repositories for the collections and the digital repository — assumed more urgency and promise. In an extended evaluation of the visionary programs that came before the Joint Standing Committee on Governance and Administration for Mission, all of the Board’s goals were highly rated in the top quartile, and three of the four were among the top ten requests.

The Board recognizes its responsibility to oversee the work of the Canonical Archivist and to be as supportive as possible of the strategic goals that he develops with the advice of the Board and the collaborative curators and professional staff of the Archives. We have a special commitment to use the variety of our Church experiences to maintain the diversity and depth of the historical collections. The Board has actively encouraged the Archivist to introduce a historical voice into church-wide conversation through social media and web technology. The Board recognizes the Archives’ goals of simultaneously documenting threads of continuity and aspects of unexpected change as essential to the identity-building process in the Church’s spiritual, institutional, and cultural life. Board members assist the Director by recommending acquisition opportunities that will add fresh and meaningful expressions of mission and ministry to the historical collections.

The Budget appropriation requested by the Board to support these goals and the program of the Archives was developed with the Executive Council and the DFMS management.

**BUDGET APPROPRIATION REQUEST, 2016-2018**

Archives and Digital Records Management	
Salaries and Benefits	\$ 2,345,381
Rent	210,000
Operations	218,811
Information and IT Services	90,000
Digital Archives/Electronic Records	<u>375,000</u>
Total	3,239,192
 Board of the Archives	
Board Meetings	\$30,000

**REPORT OF THE ARCHIVIST**

The most influential book of American historiography published in 2014, *The History Manifesto*, makes a public argument about historical practice that has special appeal to Church archivists as we map our unique information ecology. It can offer insight for church planners and leaders as they design updates to timeworn structures and a tradition-laden identity that must compete with the market-driven, technologically intensive drama of American secular culture. Most institutional leaders are given few tools and little time to think in terms of the big temporal picture — seeing one’s community and place in the passage of an historical pallet.

Specialization in education and other disciplines has relegated history to the role of intellectual toolbox of opportune facts that support short-term systems tinkering and just-in-time solutions. When we think of the future, we see a canvas of our own making, clearly imprinted with borrowings from secular models. Our visions of the Church to be are projected on the basis of perceived megatrends and futurist hunches. Looking straight into the future, without indulging in the threat of crisis and uncertainty over one’s shoulder, requires a big-picture, patient, and longer view (the tradition of the *longue durée*). The authors admonish us that this big history is what explains communities to themselves and creates an interpretive frame for institutional meaning and individual sense making.

Significantly, the authors of this secular work identify just two institutions, universities and religious institutions, as the carriers of traditions and the guardians of deep knowledge in societies. For the Church, whether the topic is structure, race, or liturgy, looking at the past to service the future reduces the impact of unsupported myths and noise. Our story can be incredibly helpful to making our next steps less dramatic and careless.

History can create a common future out of the past. It happens in countless small ways now, and in the Archives, we marvel at the numerous examples of big-picture sense making in the steady stream of inquiries that ask: how did we get to this point, why did it come about this way, and what did those good people before us have in mind? In the 2012-2014 reporting period alone, the Archives prepared more than 63 in-depth research reports on numerous aspects of Episcopal Church governance, structure, polity, liturgy, administration, finance, membership, discipline, and social service — to name the most frequent categories of an active institutional Church life.

In 2012 the Archives completed 409 research packets for the General Convention, and in 2014 the staff prepared more than a dozen research reports for CCABs and DFMS staff related to preparations for the 2015 Convention session. It has been interesting to observe the integration of a historical perspective into conversations of the Executive Council, the CCABs, and some program administration. At times, the historical research helps to shape an argument for change and policy development; at other times, it slows a premature judgment. When this big history perspective is operationalized in the mission and work of our leadership, it demonstrates a qualitative measure of the Archives' value in the ordinary community life of the Church.

### **Research Services**

The Archives receives and answers more than a thousand reference and contact questions annually. A large subset of these inquiries requires our research assistance. The Archives staff answered more research inquiries in 2014 than in any other year since 2003. For the recent three-year period, research-assisted questions amounted in total to 874 (2012), 929 (2013), and 960 (2014).

Employment of a part-time staff assistant dedicated to research became necessary to respond to the greater inflow of requests. Use statistics indicate that the majority (58 percent) of the inquiries originate from Episcopal Church members (compared to more than 70 percent in the previous trienniums). The accelerated number of total users in the 2012-2014 reporting period owes to a more visible internet presence (and online contact form), which has simplified the process of asking questions, especially from individuals outside the Church's networks.

Although the Archives has been delayed in rolling out its new website, the existing site continues to draw steady traffic and is the way we are able to reach and measure a wider audience. The number of unique URL hosts (or individual users) served by the Archives' website increased incrementally in the reporting period: 81,740 (2012), 91,275 (2013), and 116,336 (2014). The Digital Archives and the African-American Episcopal microsite are the most popular resources on the Archives' website (<http://episcopalarchives.org>). On average, about 48 percent of the content is taken from the Digital Archives section of the site. About 25 percent of the website's total use is content that is viewed from the Archives' exhibit on African-American Episcopalians.

External use of the Archives by scholars is a steady if smaller percentage of the overall contact with researchers. In 2012-2014, scholars used the Archives to explore publications in a variety of areas. The following list is a sample of the topics covered by these studies.

- William White and early church structure
- Deaconesses serving the Pacific Northwest and California
- Missionary Mary Elizabeth Wood and the establishment of modern libraries in China
- Alexander Crummell and the Church in Liberia
- Episcopal Church marketing approaches to new members
- Japanese Americans and the internment camps
- Native American research on indigenous family historical ties in Alaska

Mexican Independent Episcopal Church and Church of Jesus Christ, and The Episcopal Church  
 Changes in Episcopal identity among Church leaders during the 1960s  
 Biographical research on The Rt. Rev. Walter Dennis  
 The Episcopal Church in Cuba  
 Nursing education at St. Luke's in Tokyo  
 Reactions to the Haiti Mission among African Americans  
 Mission policy in the Philippines in the 20th century  
 Influence of mission schools on economics education in Asia  
 Episcopal missionaries in the Appalachian Mountains

**Legal Research.** The Archives continues to expend considerable staff time and resources in support of legal counsel for The Episcopal Church and the dioceses that are the continuing Church jurisdictions. Litigation support has focused on the Episcopal Church in South Carolina and Fort Worth, with continuing casework in San Joaquin and other dioceses with parish property issues. The Archivist has been called to testify to the document authenticity for the trial courts. In response to a question from Executive Council for an accounting, the Archives calculated more than 1,136 hours of litigation support in 2013-2014, which has been valued at no less than \$220,000 at market labor rates.

**Institutional Research and Documentation Projects.** The Archives gave substantial documentation support in the triennium to the General Convention and to several standing commissions and committees. The curators created online digital repositories for circulating and collating historical data central to the interim bodies' assigned tasks. These collaborations included:

**Constitution and Canons, 2012.** The Archives staff completed editing the General Convention's revised Constitution and Canons for publication in 2013. This work requires a close reading and audit of the Convention minutes to authenticate each case of amendment. Staff spent 350 hours recovering accurate text, indexing, and preparing the work for publication.

**SCLM: Resources for Blessing Same-Sex Relationships.** The 2012 General Convention adopted the trial use liturgy, The Witnessing and Blessing of a Lifelong Covenant, which relied on a Digital Archive of historical resources on Same-Gender Blessings. The Archives continued to support the Commission by gathering more than 100 responses from Bishops on the trial use.

**Task Force on Marriage Resources.** The Archives collaborated with the Task Force to post a Digital Archive website of more than 1,250 pages of official statements, resolutions, and documents to help the Task Force place recent discussions of same-sex unions in the historical context of marital commitment.

**Rules of Order Study.** Research assistance was given to the Deputies' Special Study Committee on the Rules of Order in the form of a narrative report and table of cross-indexed abstracts of major changes to the Rules of Order since 1789. One hundred and twenty eight

(128) sets of rules for both Houses and Joint Rules were analyzed and posted to the Archives' website for the Committee's use.

**SCCC-White and Dykman Subcommittee.** The Archives has continued to work with the SCCC Committee to revise the Annotated Constitution and Canons (White & Dykman). The staff have provided both historical research and consulting on document management. A digitization effort has begun for the creation of an online case file archive. The Archives will work with the Committee to shape a web space and electronic library for future editorial work.

**Native American Boarding Schools Project.** The Archives has carried out a large-scale research project into the history of Indian boarding schools in the United States. The research to date has entailed a careful reading of the Records of the Board of Missions to understand the relationship between the Church and the U.S. government in establishing and running several Indian boarding schools beginning in the late 19th century. The curators have compiled a nearly full identification of the Episcopal boarding schools (most of them local). This work continues.

**Cancionero Archive.** The Cancionero Project involved an ecumenical team founded and led by Episcopal clergy to create a comprehensive Spanish-language hymnal. The Archives assisted the Project in creating a permanent digital archive of more than 1,600 files comprising 4.65 GB of data.

**General Convention Publications, Consulting, and Training.** The Archives has assisted the General Convention Office in recruiting and training a staff editor in the preparation of publications, beginning with the Blue Book, using modern XML publishing tools in a move away from word-processing publishing tools. For the Archives, this is an investment in clean, standard data and a robust preservation format for swifter conversion to the Digital Archives.

### Digital Archives and Digital Access

The archivists have made progress in converting legacy data to digital formats, which is now a standard approach to access and preservation programs. Conversion of records for permanent retention is a more intensive operation than simply producing scanned output. In the case of the frequently used *Acts of Convention*, for example, the task is a four-month-long assignment that requires a thorough validation of the General Convention's actions and minutes. Digitization for preservation and access involves careful document preparation, metadata assignment or indexing, scanning specifications, and post-production quality control. The quality review of the output is most critical and important to ensure authentic reproductions. Each page or data file is examined for content, clarity, and maximum visual representation, as

these digital documents are expected to replace the record copy. The following projects are among the most important accomplished in the 2012-2014 reporting period.

**Acts of Convention 2012.** General Convention resolutions were fully audited and normalized to add 282 resolutions with complete legislative history to the Acts database. Many resolutions required repair as the minutes from the Convention were in rough form due to an unexpected staff departure. Each piece of legislation was topically indexed. Metadata were added to clarify history and enhance searching.

**Reports to General Convention (Blue Book) 2012.** The Archives maintains a single source for researching the post-1976 reports of General Convention bodies, which were published in the Blue Book. The Archives was able in 2014 to update the Blue Book dataset with the 2012 General Convention reports, including additional metadata to improve search capacity.

**Digitization of Historical Collections.** Preservation of archival material through high-quality digitization is performed on a scale that selects material with high-use potential, and records that are currently kept on fragile media that are in danger of becoming technologically obsolete (e.g., videocassette recordings); or where loss of data is imminent due to poor storage and handling. Typically the Archives also creates low-grade (low-storage) digital copies for research purposes, many of which will eventually be offered through the Archives' website. The following list contains the major collections that have been transferred to digital preservation formats since our last report.

**Constitutions & Canons, 1964-1997; 47.4 GB.** Starting in 1964, the Constitution & Canons were published as separate volumes. This conversion completes a full run of these documents, which before 1964 were published as part of the Journals (previously digitized).

**Episcopalian/Episcopal Life, 1960-2011; 4 TB.** The Episcopal Church's official monthly journal was last printed in January 2011. The digitization project concluded in July 2013, resulting in 22,000 pages of digital data.

**China Oral Histories: Audio Interviews, 1981-1991; 391 GB.** The collection includes 53 interviews conducted over a 10-year period to document Episcopal missionaries in China in the first half of the 20th century.

**General Convention Audio and Video Recordings, 1970-1976, 1994, 2000, and 2006; 5.75 TB.** Responding to a request by the President of the House of Deputies for insights into leadership styles, the Archives converted analog audio recordings and video recordings of the 2006 Convention to preservation files with additional access copies.

**First Women Ordinands, 2001-2002; 4 GB.** As part of the 40th-anniversary commemoration of the Philadelphia 11, the Archives converted audio interviews from 2001-2002 with The Revs.



Alison Cheek and Nancy Wittig, as well as the recorded Philadelphia ordination service and post-service press conference from 1974.

**Interviews with The Rt. Rev. Harold Jones, c. 1978-1980; 8.42 GB.** Preservation and access copies have been made of analog audio interviews of Bishop Jones, who was The Episcopal Church's First Native-American Bishop.

**Sermons and Addresses of The Rev. Thomas W. Logan, Sr. 1975-2001; 18.3 GB.** Included as part of Logan's donated papers, a series of audio-recorded sermons and addresses from various parishes and seasons were converted from tape to digital preservation copy.

**Standing Commission on Health and Human Affairs: Hearings on Homosexuality, 1977-1979; 72.5 GB.** In the 1976-79 triennium, an in-depth study concerning ordination of homosexual persons absorbed almost the entire time and effort of the Standing Commission on Health and Human Affairs. The Archives converted a number of recorded hearings, testimony, and meetings held by the Commission in various cities throughout the United States.

**Episcopal Society for Cultural and Racial Unity, 1954-1955, 1963, and 1968; 16 GB.** Audio recordings converted in this collection include "The Saga of Selma," a 1963 ESCRU meeting; and other recorded readings and radio devotions by notable clerical figures in the organization.

**Missionary Papers, Dr. Floyd O'Hara, c. 1931-1939; 142 GB.** Five early 20th-century motion picture films, donated by Dr. O'Hara's son Brian, were digitally restored. The films document everyday life in China, including remarkable footage of the Nanking invasion of 1937.

**Selected Audio Collections, 1947-1999; 10 GB.** A number of smaller items were digitized to ensure preservation. These include: World Mission Records (1976-1987); Executive Council Meeting Audio Recordings (1991-1998); Interview with the Reverend Bonnell Spencer (1990); the Swatos/Phillips Research Interviews with Episcopal Church Leaders (1998-1999); Interview with Cathedral Films' James Friedrich (1947); and Presiding Bishop John Allin's "Statement on the Ordination of the Eleven Female Deacons in Philadelphia" (1974).

**Digital Content and the Archives' Website.** Since 2012, the staff has devoted considerable resources to developing a next-generation website presence by means of a content management system for the site. The premature loss of the digital curator at the height of that development and a prolonged recruitment impaired our progress. A new digital archivist was hired in the summer of 2014, and some recovery of our

schedule allows for an optimistic expectation that the new site will debut before General Convention 2015. The site has been designed with the help of programmers, but is based on the archivists' specifications for user preferences. The greatest challenge is the migration of legacy data to the new site, which requires intensive staff focus and participation. The site is designed to host a larger data offering (through an Episcopal Text Center), while maintaining good navigability.

### **Electronic Records Acquisition/Digital Repository**

A time will come in the near future, optimistically the next Convention report, when highlighting work on electronic records *per se* will appear strangely outdated in view of the rapid transition of so many archival operations to the routine management of digital data. In recent years, the entire curatorial staff have engaged in various threads of research on the constantly changing (and improving) methods and workflows for acquiring electronic records. The curators have identified best-practice approaches for securing large datasets into a digital repository to ensure the survival of contemporary history and business records. The Archives acquired framework components of a storage system to make this happen in 2013, but fell short of what was needed for software to acquire and manage the records.

Two events gave momentum to a positive change in our direction in 2014: the hiring of a new digital archivist to fill out a holdings management team, and a refreshing vote of confidence from the Executive Council in the form of a supplementary budget allocation for this assignment. The budget allocation came on the heels of an Archives proposal requested by Council's Committee on Governance and Administration.

The Committee had looked with concern on possible risks related to copyright, data privacy, and information security in online systems of the DFMS and General Convention — information governance issues that the Archivist has frequently underscored in advocating for an electronic records management system for the DFMS. With the additional funding, the curators began planning in earnest in late 2014 for the first phase of an e-records acquisition system: in-house servers and backup options, software for ingesting and authenticating e-data, and a workbench of open-source tools for normalizing, tracking, refreshing, and indexing electronic records. The digital repository will begin operation in 2015.

An early application will be the creation of a repository interface to accept digital filings from dioceses and others, especially the canonical deposit of journals and annual reports. The digital repository will be tested in early 2015 as the Archives transfers up to 13 TB of stored legacy data (or 26 TB for redundant storage) to the vault-like servers that support the repository. Secured backup will be part of the overall architecture by negotiating a private cloud contract.

To ensure sustainable preservation of the electronic records, the curators regularly audit and document IT systems, and utilize outside consultants to upgrade and test current technology and network stability. In the past triennium, we have installed two new high-end data servers and new on- and off-site back-up provisions. A less expensive internet service provider was selected with the installation of a new fiber-optic cable connection. The information specialization of professional staff allows the Archives to conduct its own IT troubleshooting, which minimizes our annual system administration costs to less than \$20,000 per year to maintain multiple servers, 10 workstations, and an open-source software platform.

### **Holdings Management and Access**

As of the end of 2014, the Archives' holdings are stored in five separate locations, including three off-site warehouse locations, the Austin repository, and our New York Records Center. None of the storage facilities for the Church's archives are adequately climate-controlled, but we are forced to use them for cost-control reasons.

Approximately 70 percent of the archival material is housed in the Austin and New York facilities, which are kept at approximately 70° F, which is 15° F above generally accepted archival standards for a preservation environment. The HVAC system for the Austin facility was replaced in 2013, which has meant that fluctuations are controlled and minimal; humidity levels are moderate at about 55-60 percent. The storage conditions for the Church's archives are clearly inadequate and below industry standards. This situation is at best a holding pattern until a decision is made on a permanent archives facility. The total holdings measure approximately 18,000 cubic feet of analog or physical data, and 12.5 TB of digital data.

Reduced staff resources and the heavy research commitment to litigation support in the triennium pushed many back-of-the-shop archival tasks into arrearage — specifically intake, processing, and descriptive cataloguing. Thanks to some donor grants and an amazing crew of part-time employees (many associated with the University of Texas Information School), we made some notable progress.

**Archives' Online Catalogue.** The goal to launch our online catalogue in 2014 (tentatively dubbed, "Epilog") has been delayed. We pursue this goal as a priority, and some small but important steps were accomplished. In 2013, the curators completed a new intellectual classification scheme and devised a workflow that breaks from the legacy finding-aid systems, freeing the curators to think of the catalogue as a whole new way to map the archives for users. The long, hard work of converting a hodgepodge of old descriptive data will begin in 2015.

**Audit of Holdings.** The Archives completed a comprehensive audit of its holdings in 2014. This two-year project was the first in a decade. The audit is a periodic measure that ensures the holdings' inventories are fully compliant with the material they are intended to describe and that they contain all the essential information needed to locate and respond to inquiries about their general content and provenance. It was a two-way audit from inventories to holdings, and from the shelves back to the various guides and control lists. Side benefits included the collection of new data on preservation status, identification of collections without content listings, re-housing of poorly stored material, and spreadsheets that will allow us in the future to efficiently amalgamate multiple legacy holdings lists. The data showed 97 percent accuracy score for the Archives' inventory systems; only 3 percent of the collections audited showed problems. The standardization possible as a result of this big effort was a major step forward for the Archives.

**Archival Processing.** Arrangement and description of archival records can occur at various levels of detail depending on the research value of the papers, the amount of funding available, and the obligation to donors who have entrusted family papers with the Archives in the expectation of future access and care. In the course of the 2012-2014 period, the curatorial staff created archival inventories or finding aids to 291.2 cubic feet of records. The following collections received significant treatment at various degrees of descriptive depth. All are now open to researchers.

**Personal Papers of The Most Rev. John Maury Allin, 1887-2003; 40 cu. ft.** A full finding aid was completed in December 2014. The two-year project was partially funded by a grant from the John Maury Allin Foundation. The 23rd Presiding Bishop's personal papers complement official records, forming the most complete historical record among the primates.

**Records of the Bishops in Council, 1871-1939; .3 cu. ft.** Before the routine of interim meetings, Bishops conducted official House business as a counsel to the Presiding Bishop. This collection

was re-discovered among the Archives' miscellaneous papers and includes material on the service of missionary bishops, disciplinary matters, and material support of the clergy. The House Rule on Bishops in Council was repealed in 1989.

**Papers of The Rev. William Baillie Green, 1952-2011; 31 cu. ft.** Donated by Mrs. Donna Green, the Green archive is a rich collection including sermons, research papers, correspondence files, and audio recordings that document Green's ministry, theology, and ecumenical leadership.

**Records of the Ladies Cuban Guild of Philadelphia, American Church Missionary Society, (1855) 1885-1916; .6 cu. ft.** Records kept in scrapbooks document the earliest American missionary efforts in Cuba. The legacy papers were processed from the Archives' miscellaneous uncatalogued archive left by the Church Historical Society.

**Personal Papers of Mary Lamberton, c. 1954; .3 cu. ft.** The collection is composed of Ms. Lamberton's four-volume typescript history of St. John's University, Shanghai. The papers were processed from the Archives' miscellaneous archive left by the Church Historical Society.

**Personal Papers of William Ives Rutter, Jr., 1871-1952; .6 cu. ft.** Rutter was a founding lay member of the Church Historical Society and was active in a variety of Church and secular organizations, particularly in Pennsylvania.

**Records of the Society of St. Margaret, 1855-2010; 54.5 cu. ft.** The historical records of these women religious represent activities documented in the archives of the mother house in Boston. It covers governance and daily work routines, the work of St. Monica's Home, the Haiti mission in post-WWII years, and several mission houses and activities in other cities of the United States and Canada.

**Papers of The Rt. Rev. John Shelby Spong, 1955-2008; 9.5 cu. ft.** Correspondence, early publication drafts, and a notable set of scrapbooks comprise this addition to Bishop Spong's personal papers, which cover his appearance on numerous panels and lectures.

**Papers of The Rev. Dr. J. Robert Wright, 1950-2011; 35 cu. ft.** Dr. Wright's life, ministry, and scholarly contributions are documented in a complete archive of articles, correspondence,

subject files, and personal collections. Wright has been a prolific author and leading ecumenical figure who also served as Historiographer from 2000 to 2012.

**Diocesan and Parish History Collection, c. 1837-2014; 84 cu. ft.** This accumulating set of local church histories is frequently used for biography, architecture, church history, and even some legal inquiries. This once-loose collection has been completely inventoried for improved access. The Archives relies on donations from parishes to maintain this collection.

**China Mission Records Finding Aid, 1836-1954; 48 cu. ft.** The curators created a new archival finding aid to the heavily used China Mission Records (more than 100 document boxes). They conducted a full quality-control audit and prepared a cross-walk index to the old finding aid. The collection is now well-housed and documented, and is stored in nearly half the former space.

**Canonical Archival Collections, 2012-2014; 12.25 cu. ft.** These records include the Registrar's Consecration and Ordination Files and the Archives' official collection of Diocesan Journals of Convention. Despite repeated requests, only 59 dioceses submitted journals in 2013; 38 in 2014. In theory, the Archives should receive about a hundred journals in any one year.

### **Acquisition of Records and Archives**

In the midst of hard choices about where to devote our energies with staff vacancies and radical space limitations, the Archives has attempted to maintain a judicious acquisition effort. We acknowledge less active donor cultivation in light of the limitations. Keeping on top of the intake of new material has been a challenge, and as of this report our accessioning backlog is a full three years in arrears. We have received support from both the President of the House of Deputies and the COO to recapture in 2015 some of the labor time spent on litigation support to address our accessioning backlog.

The Archives acquired approximately 316 cubic feet of paper records in the Austin repository in the three-year reporting period 2012-2014; and approximately 10.3 TB of electronic records, which represent about 80 percent of our total digital holdings. The following is a list of outstanding acquisitions (with dates when available) in Austin or New York for the reporting period.

#### **Private Papers**

Episcopal Oral History Collection: Niobrara Oral History Project  
Papers of The Rev. Dr. Mr. Lee Belford/Diocese of Mississippi  
Papers of The Rev. Robert Brooks  
Papers of The Rev. James Callaway  
Papers of The Rt. Rev. Arthur C. Coxe  
Papers of The Rt. Rev. Paul Jones  
Papers of Ms. Elizabeth Boyd Graham  
Papers of Ms. Katherine Grammer

Papers of The Rev. Peter Gray Sears  
 Papers of The Rt. Rev. John Spong  
 Papers of The Rev. Leonel L. Mitchell  
 Papers of The Rev. (Chaplain) Kermit Smith  
 Papers of The Rev. Samuel Farmar Jarvis  
 Papers of The Rev. Winston W. Ching  
 Papers of The Rt. Rev. Bland Mitchell  
 Papers of The Rt. Rev. James M. Richardson  
 Papers of The Rev. George Maxwell Randall  
 Papers of The Rev. Max Salvador  
 Papers of The Rev. John W. Wood  
 Papers of The Rev. John D. Worrell

**General Convention and the DFMS**

Records of the Communications Office (1982-2007)  
 Records of the Church Deployment Board (1968-2009)  
 Papers of the Deputy Bishop for Anglican Communion Relations (2008-2011)  
 Records of the General Convention Executive Officer (1994-2012)  
 Records of Federal Ministries (1997-2010)  
 Records of the General Convention Legislative Session (2006-2009)  
 Records of the General Convention Legislative Committees (2012)  
 Records of the Government Relations Office (1992-2008)  
 Records of the Global Peace and Justice Office (2008-2010)  
 Records of the House of Bishops Committee on Religious Communities (c. 1983-2013)  
 Records of the Joint Standing Committee on Program, Budget and Finance Files (2004-2009)  
 Records of the President of the House of Deputies Bonnie Anderson (c. 2007-2012)  
 Records of the Presiding Bishop's Office (2006-2010)  
 Records of the Program Officer for Latin America (1989-2009)  
 Records of the Registrar of General Convention: Ordinations and Consecrations (2011-2013)  
 Records of the Standing Commission on Liturgy and Music: Blessings Project (2009-2012)  
 Records of the Trust Fund Committee and Investment Committee File (1985-2008)  
 Records of the Asiamerica Ministries (1970-1995)  
 Records of the Controller (2005-2013)  
 Records of the Presiding Bishop's Canon to the Ordinary (1998-2013)  
 Records of the United Thank Offering (2000-2011)  
 Records of the Youth Ministries Office (2006-2013)

**Episcopal Church-Affiliated Agencies**

Records of the Anglican Religious Orders in the Americas  
 Records of the Association of Anglican Musicians  
 Records of the Association of Episcopal Deacons  
 Records of Bishops Executive Secretaries Together (BEST)  
 Records of the Brotherhood of St. Andrew  
 Records of the Chancellor's Network and Conferences  
 Records of the Church Periodical Club  
 Records of the Community of the Way of the Cross  
 Records of the Episcopal Diocesan Ecumenical and Interfaith Offices  
 Records of the Episcopal Partnership for Global Mission  
 Records of Episcopal Renewal Ministries  
 Records of the Episcopal Society for Racial and Cultural Unity (accretion)

Records of the Historical Society of the Episcopal Church  
 Records of the Mississippi Conference on Church Music and Liturgy  
 Records of the National Altar Guild

**DFMS Records Administration**

The New York office of the Archives coordinates the management of semi-active records of the DFMS and General Convention and assists offices with the organization of information and retention requirements. In broad statistical counts, the Office accessioned 742 cubic feet of paper records in the 2012-2014 period, a large part of which was a purge of filing systems that had become inactive with staff reductions and structural reorganization. The Church Center archivist has conducted more than 516 consultations with offices and staff in the same period to assist them in managing electronic and paper records. The New York Archives Office received 52.38 GB of electronic data, 95 percent of which was received in 2014, when the Archives began developing an electronic records acquisition platform.

The Archives was especially instrumental in creating the first online “employee resource and information center” (ERIC), which brings to the employee’s desktop current forms, policies, directories, and other quick reference data. Built in the SharePoint software, ERIC has proven very popular with New York and remotely located DFMS staff, especially as a central human resources supplement. The Records Manager serves a gatekeeping role in maintaining accuracy and currency of the data. The ERIC platform was one of several data-mapping exercises that the Archives staff led for the Mission offices, the Presiding Bishop’s office, the Finance office, the General Convention Office, and several smaller DFMS units. The organization of electronic directories incrementally reduces staff inefficiencies with workstation data management. As of 2012, the Records Manager regularly participates in new employee orientation and termination procedures to ensure compliance with record keeping and retention policy.

**Enterprise Retention Schedules.** The Archives finished a four-year project in 2014 to develop new records retention schedules for the DFMS and the General Convention. The rewrite of departmental schedules was occasioned by several reorganizations at the Church Center beginning in 2006 that created new administrative and program functions, and closed many old record-creating units. The completely revised retention schedules contain more than 355 defined record types, which are cited to legal and administrative retention requirements. The Archives expects to submit the schedules for Executive Council approval in 2015. Once adopted, they will be posted to the in-house (ERIC) intranet and made available on the Archives’ website as a template for church-wide use.

The Enterprise Retention Schedules are the final piece of management policy development that began in the last triennium with Executive Council’s approval of a DFMS Records Retention policy. It is a tool that we hope will help the employees and agents of the DFMS to understand the need to keep records that demonstrate accountability, protect the Society from legal risk, and assure the Church of a historical record of administrative and program activities.

The curators are particularly concerned to implement retention policies for electronic data, especially private DFMS records kept in online vendor systems and other internet cloud storage, data held on inactive data servers and “shared” drives, and data held on laptop drives and home computers by remotely stationed employees. Many DFMS staff have turned to the robust, unfettered, and free tools of third-party service providers — from Gmail, Amazon, and Dropbox to the popular social media communities. These communication vehicles must also be documented in order to retain important corporate information and eliminate records that contain private or personal information. Needless to say, our paramount concern is to acquire the historical data in these externally stored records.

## Outreach

The Archives provided more than 478 individual consultations to parishes, dioceses, and Episcopal Church organizations in the 2012-2014 period. These consults covered a variety of records and archives issues, but increasingly centered on matters of the retention and preservation of electronic records and digitization. Several guides were created and posted on the Archives' website covering these topics, including two revisions to the *Records Management for Congregations: An Archives Manual for Episcopal Parishes and Missions*, which is a comprehensive tool on these topics and others. Other outreach efforts to the wider Church are described below.

**Niobrara Convocation, 2012.** The Archives staff were honored to participate in the annual Niobrara Convocation at the Standing Rock Reservation, where we conducted several oral history interviews with seven leaders from various Native-American tribes who have been long-time church members, both lay and clerical, in the indigenous Episcopal community.

**Social Media History Campaigns.** The use of Facebook to elevate the Archives' visibility took a leap in 2013 with an online summer campaign to honor the work of Episcopal Saints Thurgood Marshall, Pauli Murray, and Jonathan Daniels. Conceived as a joint project with President of the House of Deputies Gay Jennings, 33 postings of visuals and text focused on both positive and negative aspects of the Church's role in the Civil Rights Movement, with special emphasis on the impact of the Voting Rights Bill. The campaign increased our Facebook "likes" by 85 percent. Our most popular post, which covered the March on Washington, was viewed by more than 8,000 people and shared 121 times. The Archives carried through a 20-entry series of Facebook postings marking the 40th anniversary of the Philadelphia 11 ordinations. The campaign was viewed by more than 11,000 people, and one posting alone was shared 94 times.

**Grant Application for Navajoland.** The Archivist prepared a grant request from the Episcopal Church in Navajoland to the NCI Fund of the Boston Foundation. The grant, which was awarded in September in the amount of \$12,500, will fund an outreach program on alcohol awareness. The Archives' custody of the Records of the North Conway Institute on alcohol addiction inspired this effort.

**Episcopal Archivists Advisory Group.** A group of professional diocesan archivists meet regularly to participate in collaborative projects relating to local church archives. The Archives provided leadership in this role by completing the development of a website in 2013 that brings resources and standards together for parishes and other dioceses (<http://episcopalarchivists.org/>).

## Acknowledgments

The Archives received with thanks notable donations of money in this triennium. The John Maury Allin Foundation made a grant of \$20,900 for the processing and website exhibit of the Presiding Bishop's archives. The Rev. John Kitagawa, a former member of the Board, donated \$5,338.59 to the Archives in memory of his mother, Fujiko Sugimoto Kitagawa, who died earlier in the year. The Archives is the repository for the papers of John's father, The Rev. Daisuke Kitagawa.

A second gift of \$1,000 was received from the Historical Society of the Episcopal Church. Dr. Joel and Mrs. Trudy Cunningham have donated \$1,500 to the Archives in this reporting period. Alice Whitaker donated \$200 as a thank you for research that would not have been charged as a family member of donor Marilyn Robertson, widow of The Rev. E. Bolling Robertson. Mr. John Marsh made a \$250 donation for the purchase of historical publications. We very much appreciate these and countless small gifts to supplement our preservation and outreach funds.



The Episcopal Church has no finer set of dedicated employees who work cheerfully, with great resourcefulness and expert judgment, even under the difficult physical constraints that a sub-par facility imposes on their daily work habits. The current Archives staff is a team of truly fine and committed professionals, with whom I am honored to work. They exhibit a laudable faith that the Archives and its information services can make a difference to the Church's mission and ministries. Recognition is owed those responsible for the work described in this report: Corrinne Collett (Records Management and Information Services Archivist), Sarah Dana (Research Archivist), David Hales (Administrative Deputy), Whitney Hughes (Digital Archivist), and Lauren Kata (Archivist for Digital Access and Holdings Management). The curators truly value our part-time archivists and area specialists who bring a no-nonsense approach to resolving the piles of work laid before them. Special thanks to Molly Brunson, Keely Drummond, Amy FitzGerald, Patrick Goetz, Jonathan Hierholzer, Eleanor Miller, Michael Nugent, Amanda Pyszka, and Drew Schmitz.

We are grateful for the gift of wise and helpful leadership. We acknowledge the stewardship that individual members of the Board of Archives and its Executive Committee exercise in their care of the Archives, and likewise for the active support of the President of the House of Deputies Gay Jennings, Chief Operating Officer Bishop Stacy Sauls, and General Convention Executive Officer Michael Barlowe. In their own way, each person has made a contribution to the intellectual space that the curators require to stay focused on God's historical project for The Episcopal Church.

*Mark J. Duffy*  
*Canonical Archivist and Director of Archives*  
*December 30, 2014*

# CHURCH PENSION FUND

## Membership

### *Terms Ending in 2015:*

The Rt. Rev. Wayne P. Wright, D.D., *Chair*  
The Rt. Rev. Robert H. Johnson, D.D., *Vice Chair*  
Ms. Martha B. Alexander  
The Rev. Thomas James Brown  
Canon Dr. Karen Noble Hanson  
The Very Rev. Tracey Lind  
Mr. Kevin B. Lindahl, Esq.  
The Rev. Dr. Timothy J. Mitchell  
Ms. Margaret A. Niles, Esq.  
The Rt. Rev. V. Gene Robinson, D.D.  
Mr. Edgar S. Starns, CPA  
Ms. Sandra S. Swan, D.L.H.

### *Terms Ending in 2018:*

Ms. Barbara B. Creed, *Vice Chair*  
Canon Rosalie Simmonds Ballentine, Esq.  
The Rt. Rev. Diane M. Jardine Bruce  
Mr. Vincent C. Currie, Jr.  
Mr. Gordon B. Fowler, Jr.  
Dr. Delbert C. Glover, PhD  
Mr. Ryan K. Kusumoto  
Canon Kathryn Weathersby McCormick  
Mr. Solomon S. Owayda  
Ms. Diane B. Pollard  
The Very Rev. George L.W. Werner, D.D.  
Mr. Cecil Wray, Esq.

### *Elected by the CPF Board of Trustees:*

Ms. Mary Katharine Wold, *CEO and President, The Church Pension Fund*

## Summary of Work

**Mandate:** CANON I.8 Sec. 1. The Church Pension Fund, a corporation created by Chapter 97 of the Laws of 1914 of the State of New York as subsequently amended, is hereby authorized to establish and administer the clergy pension system, including life, accident and health benefits, of this Church, substantially in accordance with the principles adopted by the General Convention of 1913 and approved thereafter by the several Dioceses, with the view to providing pensions and related benefits for the Clergy who reach normal age of retirement, for the Clergy disabled by age or infirmity, and for the surviving spouses and minor children of deceased Clergy. Sec. 2. The General Convention at each regular meeting shall elect, on the nomination of a Joint Committee thereof, twelve persons to serve as Trustees of The Church Pension Fund for a term of six years and until their successors shall have been elected and have qualified, and shall also fill such vacancies as may exist on the Board of Trustees. Effective January 1, 1989, any person who has been elected as a Trustee by General Convention for twelve or more consecutive years shall not be eligible for reelection until the next regular General Convention following the one in which that person was not eligible

for reelection to the Board of Trustees. Any vacancy which occurs at a time when the General Convention is not in session may be filled by the Board of Trustees by appointment, ad interim, of a Trustee who shall serve until the next session of the General Convention thereafter shall have elected a Trustee to serve for the remainder of the unexpired term pertaining to such vacancy.

## OVERVIEW

The Church Pension Fund (CPF) (<http://www.cpg.org>) provides retirement benefits to eligible clergy and lay employees of The Episcopal Church. CPF also oversees a number of affiliated companies, including Church Life Insurance Corporation, The Episcopal Church Medical Trust, the Church Insurance Companies (which includes The Church Insurance Agency Corporation, The Church Insurance Company, The Church Insurance Company of New York, and The Church Insurance Company of Vermont), and Church Publishing Incorporated.

Collectively known as the Church Pension Group (CPG), CPF and its affiliated companies serve eligible Episcopal clergy and lay employees and their families, as well as Episcopal churches and institutions by providing retirement benefits and services, life and disability insurance, health benefits, financial and wellness education, property and casualty insurance, and book and music publishing, including the official worship materials of the Church.

CPG strives to be an advocate for the well-being of those it serves, looking ahead at needs and potential risks and developing products, programs, and services to help the Church manage them. CPG hosts hundreds of educational programs, answers more than 55,000 client calls, visits almost 4,000 congregations and other institutions, and hosts 250,000 visits to its website each year. The core values that guide CPG in fulfilling its mission are professionalism, compassion, and trustworthiness.

The population CPG serves continues to expand as the lay employee pension system and denominational health plan are implemented across the Church. Much progress was made on these and other important initiatives.

At General Convention, CPG provides data and feedback to the Church Pension Fund Committees and other committees that consider resolutions that may impact its work.

This *Blue Book* report reviews the work of CPF and its affiliated companies during the past triennium and describes a number of major areas of focus over the past three years:

- CPF Board and Governance
- Review of the Past Triennium
- Serving CPG's Participants Every Day
- Benefit Changes for Clergy and Lay Employees
- Improved Delivery of Benefits and Related Services
- Ongoing Listening Around the Church
- CPG's Corporate Citizenship Initiatives
- CPF Response to Resolutions of the 77th General Convention

### **CPF Board and Governance**

Governance of CPF is provided by a 25-member Board of Trustees that consists of 24 trustees elected by General Convention and the CPF CEO and President, who is appointed by and serves at the pleasure of the CPF Board.

## **The Work of the CPF Board**

The CPF Board makes significant decisions affecting investment strategy, pensions, and other benefits and services. It is responsible for overseeing the strategic direction of a broad and varied consortium of businesses as well as the CPF investment portfolio. The CPF Board must address complex issues faced by the pension funds and CPF's affiliated companies, both recognizing the need for compassion and flexibility and ensuring fiscal accountability. As a result, the trustees have the challenge of balancing sometimes-conflicting social and fiduciary responsibilities.

The CPF Board is enriched by the presence of lay and ordained leaders, as well as experienced investment managers, attorneys, accountants, and business and financial professionals. It is essential to bring to the Board's deliberations the most expert and thoughtful advice available to the Church. The current challenges impacting the economy and the Church put a special emphasis on CPF's fiduciary responsibilities and the need for experienced and engaged trustees.

## **The Election Process and the Current CPF Board**

As set out in The Episcopal Church's Canons, General Convention will elect 12 trustees, selecting from the slate of nominees proposed by the Joint Standing Committee on Nominations.

The following three trustees are retiring from the CPF Board in 2015, having faithfully served the two consecutive six-year terms allowed by the Canons of The Episcopal Church: The Rt. Rev. Robert H. Johnson, The Rt. Rev. V. Gene Robinson, and The Rt. Rev. Wayne P. Wright. Nine trustees — Martha Bedell Alexander, The Rev. Thomas James Brown, Canon Dr. Karen Noble Hanson, The Very Rev. Tracey Lind, Kevin B. Lindahl, Esq., The Rev. Dr. Timothy J. Mitchell, Margaret A. Niles, Esq., Edgar Starns, CPA, and Sandra S. Swan, D.H.L. — are eligible and have agreed to stand for re-election. The 13 remaining trustees will continue to serve.

## REVIEW OF THE PAST TRIENNium

### **Financial Strength of CPF**

The single most important job of the CPF Board and management is monitoring the financial security of CPF. Since J.P. Morgan helped raise the first \$8.5 million to fund CPF, CPF's assets have grown steadily through prudent investment strategies and disciplined expense management. CPF monitors the funding positions of its pension plans and when it has been prudent to do so, the CPF Board has implemented significant benefit enhancements. During the fiscal year ended March 31, 2014, CPF received approximately \$87 million in assessments and paid out almost \$346 million in pension and related benefits to Episcopal clergy and lay employees.

Over the last three years, the economy has experienced a sluggish recovery, continually threatened by uncertainty both overseas and at home. Currently, interest rates sit near historically low levels. However, more recently there has been increased volatility in the level of interest rates as market participants grapple with the implications of the elimination of the Federal Reserve's bond purchase program, continued sluggish growth, and recurring geopolitical concerns.

World equity and credit markets have continued to recover from the recent downturn and, for the most part, now sit at or above pre-crisis levels. Volatility has remained low as market participants remain confident in global central banks. The investment performance of CPF for the three-year period ending September 30, 2014 was strong, with an 11.8 percent total rate of return for the period. Over the 10-year period ending September 30, 2014, the total rate of return was 8.3 percent, which exceeded both CPF's passive benchmark

of 67 percent S&P 500 stocks/33 percent bonds for that period, and its investment objective of inflation plus 4.5 percent.

CPF remains in sound financial condition due to both good investment results and strong financial stewardship. The goal is to maintain not only sufficient assets to cover benefits, but also a surplus of assets to provide a cushion in uncertain economic times, and flexibility to accommodate future entrants to the plans.

As of September 30, 2014, CPF assets stood at \$11.8 billion (unaudited). Assets Available for Benefits in The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan) stood at \$11.0 billion (unaudited). Assets Available for Benefits in The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) stood at \$172.4 million (unaudited), which is an improvement over previous years, with the remaining assets allocated for other benefits and liabilities such as the CPF Medicare Supplement subsidy for eligible clergy and their eligible spouses.

Results for the fiscal year ended March 31, 2015, will be available at General Convention in July and will also appear in the 2015 Church Pension Group Annual Report, which will be available online at <http://www.cpg.org>. CPG has been, and will continue to be, in communication with its plan beneficiaries and other clients, updating them on the financial condition of CPF through the Annual Report, other information posted on the CPG website, and CPG publications such as the semi-annual *Perspective* newsletter.

### **CPF Leadership Transitions**

This past triennium saw two important leadership transitions, with the retirement of William L. Cobb, Jr., Executive Vice President and Chief Investment Officer, and The Rev. Canon Patricia Coller, Executive Vice President and Chief Ecclesiastical Officer; and with the welcoming of their successors, Roger A. Sayler and The Rev. Canon Anne Mallonee, respectively.

#### **SERVING CPG'S PARTICIPANTS EVERY DAY**

CPG provides a broad array of employee benefits, educational programs, and other products and services to the Church.

### **Pension and Retirement Savings Plans**

CPF administers the following retirement plans for eligible clergy and lay employees of the Church:

The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan) is a defined-benefit plan in which all eligible Episcopal clergy participate through assessments paid by their employers. It currently provides pension and related benefits for a total of 18,398 active and retired clergy, eligible surviving spouses, or other named beneficiaries. Clergy Plan benefits include monthly pension benefits, a Christmas benefit, a disability retirement benefit, a lump-sum death benefit, a resettlement benefit, and a pre-retirement survivor's benefit. Other benefits offered to eligible participants in the Clergy Pension Plan through separate plans are a short-term disability benefit, life insurance, and a subsidy toward the cost of a Medicare supplement plan.

The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) is a defined-benefit pension plan that was established in 1980. It currently provides benefit coverage for almost 2,600 active and vested participants and 1,480 retirees. Lay DB Plan benefits include monthly pension benefits to retirees, a disability retirement benefit, a lump-sum death benefit, and a surviving spouse benefit to qualifying participants. Eligible participants in the Lay DB Plan are also entitled to a pre-retirement survivor's benefit, which is paid to their eligible surviving spouse if the participant dies on or after attaining age 55 but prior to retirement.

The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay DC Plan) provides individual retirement savings accounts to 10,440 active participants, with eligible employers and employees making regular contributions. There are 2,673 retired participants in the Lay DC Plan. Administered with Fidelity Investments, the Lay DC Plan offers a wide range of investment options and tools to support retirement savings planning.

The Episcopal Church Retirement Savings Plan (RSVP) is a defined contribution retirement savings plan through which clergy and eligible lay employees can make their own tax-deferred contributions toward their financial futures. Participants have their own accounts and direct the way their money is invested. Like the Lay DC Plan, Fidelity Investments is the record-keeper for the RSVP, and the investment options in the plan are the same as those in the Lay DC Plan.

### **Health, Life, Property and Casualty, and Other Products and Services**

In addition to retirement benefits, CPG provides individuals and institutions with other benefits and programs, as authorized by General Convention, through its affiliate companies, described below.

The Episcopal Church Medical Trust (Medical Trust) is the sponsor of The Episcopal Church Clergy and Employees' Benefit Trust (ECCEBT), a Voluntary Employees' Beneficiary Association (VEBA) established in 1978. The Medical Trust offers an extensive selection of health plan options to meet the unique needs of clergy, lay employees, and retirees of the Church and their eligible dependents. The Medical Trust sponsors health plans offered by world-class health networks: Aetna, Cigna, Anthem BlueCross BlueShield, Express Scripts, Kaiser, and UnitedHealthcare. The Medical Trust provides in-network access to 98 percent of covered Episcopal employees nationwide. The Medical Trust offers 20 different plan designs that include preferred-provider, managed-care, and consumer-directed plans. These plans all include mental health, vision, employee-assistance, and health-advocacy benefits at no additional charge. Dental care plans are also available. One hundred dioceses and 48 institutions are currently served by the Medical Trust (an increase of eight dioceses and four institutions since 2012). CPG's relationship managers, Client Services call center, web self-service tools, personalized service, and strong administrative and educational support allow Church employers, as well as employees and retirees, to focus on their mission, confident that their health care benefits are effectively managed.

Church Life Insurance Corporation (Church Life) has provided essential life insurance protection and retirement savings products to the clergy and lay employees of the Church and their families since 1922. Church Life provides life insurance protection to all eligible active and retired Episcopal clergy through the group life plan sponsored by CPF. In addition, more than 90% of Episcopal dioceses choose to provide group life and disability insurance to their employees through Church Life. Church Life also provides group annuity funding for CPF to offer the Stable Value Option in both the Lay DC Plan and the RSVP. For clergy and lay employees seeking retirement savings and income products on an individual basis, Church Life offers an array of deferred and immediate annuities and Roth and traditional individual retirement annuity products. Since 2010, Protective Life Corporation's full portfolio of innovative individual life insurance products has been available through Church Life agents at affordable rates. Protective Life is one of the nation's leading insurance companies, rated A+ superior by A.M. Best.

The Church Insurance Companies have provided property and casualty insurance and agency services to Episcopal churches and institutions since 1929. This group of companies consists of the Church Insurance Agency Corporation (CIAC), the Church Insurance Company of Vermont (CICVT), the Church Insurance Company of New York (CICNY), and the Church Insurance Company. CIAC provides non-claim client services for all companies as well as access to insurance products of outside product partners (e.g., Liberty Mutual for workers' compensation insurance). CIAC representatives visit more than 3,700 client locations each year and publish a popular risk management e-newsletter, *The Good Steward*. Two of these companies — CICVT

and CICNY — provide insurance to eligible institutions using a captive insurance structure that is more cost-effective and flexible than any alternative. Most core activities are performed in Bennington, Vermont, where CICVT is headquartered. A meeting of diocesan participants is held in Vermont each year to gather ideas and suggestions from clients and to introduce new initiatives. These companies also fund periodic, professional valuations for all insured properties and a diocesan-endorsed program (the Episcopal Safety Program) to inspect churches and identify and correct hazards before they turn into insurance claims. While Episcopal churches and other institutions are able to purchase their property and casualty insurance from any insurer they choose, 90 percent of churches choose to buy it from the Church Insurance Companies.

Church Publishing Incorporated (CPI) was founded in 1918 and is headquartered in New York. CPI is an official publisher of worship materials and resources for the Church, as well as a multifaceted publisher and supplier to the broader ecumenical marketplace. In addition to book publishing, CPI offers church supplies; lectionary inserts; bulletins; vestments; the lectionary-based curriculum, *Living the Good News*; faith-formation programs such as *Weaving God's Promises*, *Godly Play*, and the popular “Embracing” series of video studies by such luminaries as Marcus Borg, Phyllis Tickle, Walter Brueggemann, and Kathleen Norris; and e-publishing resources and services. CPI continues to distribute its products through Cokesbury.

The exhibit below provides a summary of the clients served and services provided by CPF and each of the major affiliates.

<b>The Church Pension Fund and Affiliated Companies Services and Clients</b>		
<b>The Church Pension Fund</b>		
Clergy Pension Plan		18,398
Lay DB Plan		2,770
Lay DC Plan		13,133
RSVP Plan		5,341
<b>The Episcopal Church Medical Trust</b>		
Clergy		
Not-yet-retired		4,280
Retired and surviving spouses		5,444
Lay employees		
Not-yet-retired		9,560
Retired and surviving spouses		1,880
Family members		
Not-yet-retired		12,176
Retired		2,337
		35,677
<b>Church Life Insurance Corporation</b>		
Group insurance policies		23,350
Individual insurance policies		1,510
Annuities		4,900
Disability insureds		5,580
<b>The Church Insurance Companies</b>		
Number / percentage of Episcopal churches that purchase their property and casualty insurance from CICVT or CICY		
Episcopal churches		6,391 / 90%
Episcopal dioceses		91 / 90%
<b>Church Publishing Incorporated</b>		
Church Publishing, Morehouse Publishing, Seabury Books, Morehouse Church Supplies, Morehouse Education Resources		
Books in print		891
Church supplies		896
Christian Education resources		350
eBooks		617
eProducts		50
<i>As of October 31, 2014</i>		



## BENEFIT CHANGES FOR CLERGY AND LAY EMPLOYEES

CPG's responsibility is to provide retirement, health, and related benefits to the eligible clergy and lay employees of the Church. Despite continuing economic volatility, CPG has been blessed with sufficient resources that have allowed it to improve and enhance benefits during this triennium.

### **COLA Determinations for the Years 2013-2015**

Although not required by plan rules, the CPF Board has granted cost-of-living-related pension increases (COLAs) to beneficiaries of its defined benefit plans when economic circumstances with respect to inflation justified it and the financial condition of the plans allowed for it. While the CPF Board makes its own decisions as to these increases, it historically has looked to the U.S. Bureau of Labor Statistics' Consumer Price Index (CPI) as a benchmark to guide its thinking, a standard that many organizations, such as the Social Security Administration (SSA), look to when making decisions about cost-of-living increases. For the years 2013, 2014, and 2015, the SSA granted cost-of-living increases of 1.7 percent, 1.5 percent, and 1.7 percent, respectively.

In making its COLA decisions for each of those years, the CPF Board referred to its current COLA policy stating that no COLA will be granted for a pension plan that has a funding ratio of less than 1.00. The funding ratio, which is calculated by dividing the plan's assets by its actuarially determined liabilities, is a measure of the financial strength of a pension plan. A funding ratio of 1.00 means the assets are at least equal to the actuarially determined liabilities, even with the estimated cost of the discretionary COLA factored into the assumptions. The granting of a COLA in any given year results in increased payments to currently retired participants and has the potential, therefore, to reduce the funding ratio.

As of September 30th of the years 2012, 2013, and 2014, the Clergy Pension Plan had a funding ratio above 1.00, and therefore cost of living increases equal to the SSA's COLAs for 2013, 2014, and 2015 were granted to beneficiaries in the Clergy Pension Plan in those years. While the funding ratio of the Lay DB Plan has improved substantially over the past three years, the Lay DB Plan's funding ratio remained less than 1.00 in each of those three years, and therefore COLAs were not granted in that plan.

Cost-of-living increases equal to the Social Security Administration's COLAs for 2013, 2014, and 2015, respectively, were granted to clergy retirees and their beneficiaries in the non-domestic dioceses of The Episcopal Church and Iglesia Anglicana de la Region Central de America (IARCA).

The financial position of the Clergy Pension Plan and the Lay Defined Benefit Plan is disclosed in the CPG Annual Report each year.

### **New Compensation Standard Established for Accruing Full-Time Credited Service under the Clergy Pension Plan**

In order to assist the growing number of clergy working part-time, effective January 1, 2013, a participant who earns \$18,200 or more per year (the "Hypothetical Minimum Compensation," which is subject to change by the CPF Board) is credited with a full year of service, and a participant who earns less than \$18,200 per year is credited with a partial year of service. In addition, participants may establish make-up accounts to pay assessments on the difference between the actual compensation earned and \$18,200 in order to receive a full year of credited service.

### **Medicare Supplement Plans**

CPF has long provided a subsidy to eligible clergy and their eligible spouses toward the cost of a Medical Trust Medicare Supplement Plan (the Medicare Supplement subsidy), although given the rising cost of

medical care, coupled with the uncertainty regarding the structure of Medicare in the future, the provision of this subsidy is not guaranteed. The Medical Trust offers three post-65 retiree Medicare Supplement Plans — the Comprehensive, Plus, and Premium Plans — that retirees may choose from to suit their health care needs and financial resources. These plans provide benefits supplemental to Medicare’s coverage for hospital stays, physician visits, lab work, annual physicals, and prescription drugs. The Medical Trust also offers three dental plans to retirees. The plans have been continually improved over time, including the addition of hearing and travel benefits, a 24/7 nurse line, Health Advocate resources, and the Employee Assistance Program.

Costs for the Medicare Supplement Plans have increased modestly each year from 2013 through 2015: a cumulative total of \$30 per member per month for the Comprehensive Plan and \$45 per member per month for the Plus and Premium Plans. However, the Medicare Supplement subsidy was increased to cover the full cost increase for the Comprehensive Plan for all eligible clergy who retired with 20 or more years of credited service under the Clergy Pension Plan and their eligible spouses. Effective with retirements on or after July 1, 2013, the amount of the monthly Medicare Supplement subsidy is based on a percentage of the total monthly cost of the Medical Trust’s Comprehensive Plan, adjusted by years of credited service. Clergy who were already retired as of that date and their eligible spouses or surviving spouses, and clergy who were eligible to retire as of June 30, 2013 but chose to retire at a later date and their eligible spouses or surviving spouses, were not affected by this change.

Enhancements to the Medicare Supplement Plans have been made during the past triennium. Effective January 1, 2013, the Medical Trust increased the annual benefit maximum for the Basic Dental and Dental & Orthodontia Plans from \$1,500 to \$2,000. The implementation of the Medicare Secondary Payer Small Employer Exception Plan as of January 2013 provides premium reductions for qualifying small employers who choose to participate and lower out-of-pocket costs for most qualifying employees who choose to participate. Effective January 1, 2014, the Medical Trust’s Medicare Supplement Plan prescription drug benefit changed to a Medicare Part D Plan with additional benefits administered by Express Scripts. This program exceeds Medicare Part D’s required level of coverage. It provides benefits comparable to our previous Express Scripts plan while eliminating the \$50 retail pharmacy deductible, making brand-name medications available without a penalty, and providing additional coverage during the coverage gap (“donut hole”) stage. Effective January 1, 2015, the Medical Trust is adding the SilverSneakers fitness program, the nation’s leader in promoting overall health and well-being to Medicare-eligible members, focusing on physical activity, social interaction, and health education.

### **Health Care Benefits for Active Clergy and Lay Employees**

The Medical Trust continues to offer an extensive selection of health plan options to meet the unique needs of clergy and lay employees of the Church and their eligible dependents. Effective January 1, 2013, the Medical Trust increased the annual benefit maximum for the Basic Dental and Dental & Orthodontia Plans from \$1,500 to \$2,000. The Medical Trust has also continued to implement the requirements of the Affordable Care Act (ACA), many of which result in benefit enhancements for our members. For example, payments such as copays, coinsurance, and deductibles now count toward the out-of-pocket limit on expenses for which members are responsible. In 2014, this was applied to medical and behavioral services, and for 2015 it is being extended to prescription drugs. Benefit enhancements for 2015 include Applied Behavioral Analysis (ABA Therapy) for children with Autism Spectrum Disorder, a benefit for treatment of infertility up to the prescribed limit, and medical transition benefits for transgender clients including gender reassignment surgeries and hormone replacement therapies. Wellness initiatives are ongoing and include targeted education and communications and an annual Benefits Partnership Conference for administrators.

## **Investment Options in the Defined Contribution Plans**

CPG regularly reviews the investment options offered under its defined contribution plans (i.e., bond funds, equity funds, target date funds, etc.) and monitors the performance of each investment option. In so doing, it considers whether changes should be made to try to ensure that the options continue to help participants meet their financial goals and investment objectives and to take advantage of opportunities in the financial markets. For example, effective January 16, 2013, a new share class of the Fidelity Freedom Funds® — the Fidelity Freedom K Funds® — was made available to participants in the Lay DC Plan and the RSVP in order to provide the same investment strategy and risk as the Fidelity Freedom Funds® but at an overall lower cost. In July 2014, CPF added new, low-cost Fidelity Index Funds, as well as a lower cost share class for five existing investment options. Effective January 2, 2015, and commencing with fees assessed after the first quarter of 2015 based on fourth-quarter 2014 balances, the administration fees charged on the Lay DC Plan and RSVP will be reduced from 7.5 basis points of the quarterly mutual fund account balance to 5.0 basis points. This means that a participant with a quarterly balance of \$10,000 will enjoy a fee reduction of \$2.50 per quarter.

### **IMPROVED DELIVERY OF BENEFITS AND RELATED SERVICES**

With almost 100 years of history serving the institutions and individuals who comprise the Church, CPG continues to look for ways to improve the service experience it offers. One way CPG accomplishes this is by speaking with clients around the Church about how the organization can better support them in their interactions with CPG.

### **Easier, More Seamless Benefits Experience**

Last year, CPG restructured several of its client-facing functions to provide both administrators and employees with a more seamless benefits experience across various life events. In addition, more and more, CPG is exploring ways to use digital media to deliver high-quality information, education, and service. The Medical Life Participant System (MLPS), as well as the Institution Roster, the Employee Roster, and MyCPG Accounts that were launched last year on <http://www.cpg.org> are examples. CPG's innovation in this area continues at a pace that feels appropriate for those it serves.

The administrator service experience is a high priority for the organization. Its user-friendly, web-based tools provide real-time data management and benefits administration through web self-service from any computer, 24/7. CPG streamlined verification procedures so that administrators can get the information they need quickly and safely, and created a dedicated toll-free administrator number staffed with experienced, cross-trained client service representatives who are able to answer a variety of benefits-related questions. CPG launched an Administrators' Resource Center (ARC) on its website that provides diocesan, parish, and institutional administrators with the tools, forms, guides, benefits news, and other updates they need to do their jobs. And it is developing "just in time" web-based training for new and experienced administrators to supplement the in-person conferences CPG hosts for administrators during the year.

### **Financial and Wellness Education**

During the past triennium, CPG has reevaluated the needs of those it serves with educational programs and resources around financial and physical wellness. As a result, CPG has enhanced its existing conferences, such as Planning For Tomorrow, Enriching Your Retirement, Steps to Wellness, and CREDO; added new programs that focus on physical and emotional health; and broadened the range of planning resources it offers online. Whether saving for retirement or focusing on their physical health and well-being, CPG clients may take advantage of a wide variety of educational programs, tools, and resources that CPG makes available to them.

The Planning For Tomorrow conferences provide financial education and strategies for increasing retirement security and making the most of CPG's benefit programs. Steps to Wellness conferences provide education and strategies for healthy eating, exercising, and reducing stress. In order to extend the wellness experience beyond the conferences themselves, CPG added optional post-conference programs. CREDO conferences encourage a holistic approach to wellness — spiritual, vocational, financial, and physical — through personal reflection and discernment. There are CREDO I and II conferences for active clergy, and separate conferences for recently ordained, retired, and bi-vocational or part-time clergy. Walk and Be Well is a 28-day walking program delivered through a series of online podcasts. CPG enhanced its service to retired clergy through updated formats for its Enriching Your Retirement conferences that are coordinated with local dioceses around the Church. Online financial- and wellness-education resources include retirement-planning calculators, guides, informative webinars on a variety of topics, and the ability to schedule a personal consultation with trained specialists. To learn more about these and other wellness programs, go to <http://www.cpg.org/wellness>.

#### ONGOING LISTENING AROUND THE CHURCH

CPG is committed to ongoing dialogue with the individuals and institutions it serves. To this end, it conducts ongoing surveys, focus groups, and other meetings to collect feedback. More than a year ago, CPG commenced a series of listening events to explore the specific issues facing the Church that intersect with the mission of the organization.

The CPG executive team and CPF trustees have been hosting a series of targeted focus groups, regional forums, and smaller conferences that will have taken them to all of the Provinces of the Church during this triennium. These face-to-face discussions with clergy, lay employees, treasurers, and wardens will inform deliberations as CPG leadership contemplates the evolving needs of those it serves and potential, mission-appropriate ways to address them.

CPG is especially interested in the Church's input around specific initiatives it is considering in light of the changing demographics of those they serve. Areas of focus include the personal-finance and wellness-education needs of seminarians, the education and benefit needs of part-time and bi-vocational clergy, and the impact of late ordination on retirement planning and benefits. These topics and others are the subject of ongoing strategic discussion by the CPF Board and management.

#### **Continuing Outreach to Bishops**

During 2014, CPG held a series of one-on-one phone conversations with 70 diocesan, provisional, and suffragan bishops in order to talk about issues of specific interest to them and to learn what they see as the most pressing needs of the Church that lie within CPG's mission. Topics raised most often in these conversations included congregational development, congregational finances, development of clergy leadership skills, and current cultural and societal changes in which religion has a less certain place. Addressing some of these issues falls outside of CPG's mission, but the conversations have given the organization a sense of the challenges and opportunities facing Church leadership. CPG will be following up on these conversations by meeting with bishops, both individually and in groups, in order to delve more deeply into areas where their needs and its mission overlap.

#### CPG'S CORPORATE CITIZENSHIP INITIATIVES

CPG has a strong history of corporate social responsibility. Its programs encompass sustainable, environmentally friendly operations; diversity in employment and purchasing; community outreach; and socially responsible investing that is consistent with its fiduciary responsibilities.

### **Socially Responsible Investing Consistent with CPF's Fiduciary Responsibilities**

The organization has a fiduciary responsibility as a pension fund, charged with the fiscal stewardship of CPF's assets to ensure that the benefits it promises members are there for them. To that end, CPF has a broadly diversified portfolio of securities invested across the globe in a variety of investment strategies. Because they also recognize that their investments can play an important role in addressing social needs, CPF's investment team actively identifies a variety of investments that offer fully competitive investment returns while also providing important social benefits. CPF's current portfolio includes economically targeted investments, environmentally responsible investments, and investments with women- and minority-owned firms and investment management partners. In addition, CPF encourages changes in corporate behavior by filing shareholder resolutions with companies in its investment portfolio, in collaboration with Executive Council's Corporate Social Responsibility Committee. Most recently, these resolutions have encouraged companies to reduce greenhouse gas emissions, to increase diversity on corporate boards of directors, and to prevent human trafficking. All this is part of a larger, organization-wide commitment to making socially responsible "investments" — of time, talent, and other resources — that have tangible social impact.

CPF also is committed to using its power as a shareholder to influence corporate behavior in a manner that addresses the faith and important social, ethical, and environmental concerns of The Episcopal Church, to the extent consistent with its fiduciary, regulatory, and other legal responsibilities. To this end, CPF votes proxies consistent with these values.

### **Sustainable, Environmentally Friendly Operations**

CPG has a long-standing commitment to operating in an environmentally responsible, sustainable manner. Its efforts include the use of electronic publishing for internal and external documents and statements, and sustainable practices in its office operations, including recycling and the use of low-VOC paints and carpets. In designing the organization's new home office, CPG specialists teamed with architects and engineers to create an environment that meets LEED-certified levels of sustainability and cost efficiency in water and energy use, building materials, and environmental quality.

### **Diversity in Employment and Purchasing**

Diversity is woven into the fabric of the culture at CPG, and the organization demonstrates its commitment to this principle in numerous ways, including an active Diversity Council and a Development and Diversity Officer who develops, aligns, and delivers programs that advance a culture of inclusiveness. In addition, CPG's recruiting efforts include partnerships with diversity organizations that allow it to nurture relationships with future leaders. CPG's Minority Supplier Program is a company-wide initiative to identify opportunities to expand CPG's business interactions with companies owned by women and other underrepresented groups.

### **Community Outreach**

CPG is committed to community outreach through ongoing fundraising and grassroots ministries. Its employees support Episcopal organizations in New York City and elsewhere by way of collection drives that support the elderly, the homeless, the hungry, the victims of natural disasters, and other underserved groups.

### **CPF RESPONSE TO RESOLUTIONS OF THE 77TH GENERAL CONVENTION**

CPF was asked to respond to a number of resolutions of the 77th General Convention. The following is a summary of its actions in regard to the resolutions dealing with the Denominational Health Plan and Lay Employee Pension System, respectively. Its responses to other resolutions can be found at the end of this report.

**Response to Resolution B026: Implementation of the Denominational Health Plan**

In 2009, the 76th General Convention passed Resolution A177 and its associated Canon establishing the Denominational Health Plan (DHP). The resolution requires that clergy and lay employees scheduled to work at least 1,500 compensated hours annually for any domestic diocese, parish, mission, or other ecclesiastical organization or body subject to the authority of the Church be provided with equal access to, and funding for, health care coverage, with health care benefits to be provided through the Medical Trust. In 2012, the 77th General Convention passed Resolution B026 affirming the requirements of Resolution A177, but extending the period for achieving parity in cost-sharing until December 31, 2015. The DHP has the additional goal of achieving cost-containment for the Church in light of continually rising healthcare costs.

Although all domestic dioceses, congregations, and missions are required to participate in the DHP, each diocese decides whether its schools, day care facilities, and other diocesan institutions are required to participate. Dioceses also decide what their diocesan-wide cost-sharing policy will be, whether or not to offer domestic partner health care benefits, and what Medical Trust health plans to offer. Individual employees may opt out of the DHP if they have coverage through approved sources such as a spouse or partner's coverage, Tricare, or individual coverage through the Health Insurance Marketplace if verification of qualification for federal premium tax credits is provided. CPG relationship managers work with each diocese to custom tailor an implementation plan to specific needs.

CPG has reached out to dioceses and provinces to assist Church employers with understanding their choices under the DHP. As of January 1, 2014, all domestic dioceses, missions, or other ecclesiastical organizations subject to the authority of the Church were enrolled in Medical Trust plans for their active clergy and eligible lay employees.

The DHP continues to deliver cost-containment to the Church. The increased collective purchasing power due to the expanded participation in the Medical Trust allowed the DHP to drive cumulative cost-containment leading to a savings of approximately 13 percent, or \$69 million, to the Church from 2012 through 2014. These savings have been passed directly to the Church through lower annual rate increases for participating dioceses and institutions. Over the past triennium, Medical Trust average contribution rate increases have been between 4 percent and 6 percent, consistently 1 percent to 3 percent lower than national industry trends over that same time period.

Material progress has been made toward more equitable cost-sharing. Resolution B026 urges the Medical Trust to continue to reduce the disparity in health care premium costs among dioceses. Before the passage of the DHP, the Medical Trust operated with 14 pricing bands (where band 14 rates were approximately three times the level of band 1 rates). The cumulative DHP savings realized to date have enabled the Medical Trust to take meaningful steps in addressing the premium cost disparities that have historically existed by compressing the pricing structure from 14 bands to 6 bands from 2011 through 2014 renewals. Further action was taken for 2015 renewals, resulting in rate levels that positioned over three-quarters of dioceses to within 5 percent of the average Medical Trust book of business rate. CPG anticipates minimal additional movement as it looks to balance equitable sharing of costs with local market competition.

CPG continues to monitor both federal and state healthcare reform legislation and the emerging healthcare exchange offerings brought about by the Affordable Care Act, responding to changing requirements and adapting health plans in ways that seek to minimize disruption to participating groups and members.

Non-Domestic Dioceses. Although non-domestic dioceses and institutions are not part of the DHP as defined by Resolution A177, the resolution directed CPF to “continue to work with the Dioceses of Colombia, Convocation of American Churches in Europe, Dominican Republic, Ecuador Central, Ecuador Litoral, Haiti,

Honduras, Micronesia, Taiwan, and Venezuela to make recommendations with respect to the provision and funding of healthcare benefits of such dioceses under The Denominational Health Plan.”

In response to varying economic and healthcare access constraints in these countries, the CPF Board established the Fund for Medical Assistance (FMA) as a five-year pilot program in 2010. The purpose of the FMA is to provide funding for qualified medical expenses incurred by eligible clergy and lay employees in certain non-domestic dioceses when those expenses are not covered by public or private insurance. Active clergy and lay employees scheduled to work 1,500 hours or more per year are eligible to apply for this assistance through their bishop. In 2014, the CPF Board approved a three-year extension of the FMA, expanded eligibility, simplified the application process, and provided greater overall flexibility in efforts to promote greater use of this program.

DHP Advisory Group Becomes CPG Client Council. As required by Resolution A177, an advisory committee was created in 2009 with the purpose of being an additional channel of feedback from leaders in each province. Their input provided useful feedback and was integrated into the DHP strategy and process. More recently, this advisory committee has evolved to become a Client Council with an even broader mandate. In addition to fulfilling the responsibilities of the advisory committee required by Resolution A177, members of the Client Council are encouraged to offer feedback on all of CPG’s current programs and to provide input on new ideas the organization may be considering.

The Client Council is composed of diverse stakeholders from around the Church: The Rev. Canon Lucy Amerman (Canon to the Ordinary for Pastoral Services, Diocese of Pennsylvania); Robert Biehl (Treasurer, Diocese of Texas); Anilin Collado (Missioner for Human Resources, Diocese of Los Angeles); Kenneth Cummings (Associate Human Resources Director, Trinity Church Wall Street, Diocese of New York); The Rev. Irv Cutter (Rector, St. John’s Episcopal Church, Diocese of Oklahoma); The Rev. Canon Neysa Ellgren (Canon to the Ordinary, Diocese of Oregon); Julie Giguere (Financial Administrator, Diocese of Vermont); The Rt. Rev. E. Ambrose Gumbs (Bishop, Diocese of the Virgin Islands); Kathleen Hall (Director of Human Resources and Administration, Diocese of Washington); JoAnn Hardy (Diocesan Administrator, Diocese of Michigan); The Rev. Dr. Daniel Heischman (Executive Director, National Association of Episcopal Schools); The Rt. Rev. Scott Hayashi (Bishop, Diocese of Utah); The Rt. Rev. Paul Lambert (Bishop Suffragan, Diocese of Dallas); Hugh McIntosh (Head of School, Episcopal High School of Baton Rouge, Diocese of Louisiana); The Rev. Rob Morpeth (Staff Officer for Finance and Administration, Diocese of Alabama); The Rev. Christopher Powell (Rector, Christ Church, Diocese of Chicago); The Rt. Rev. Wilfrido Ramos (Bishop Provisional, Iglesia Episcopal Puertorriqueña); Todd Rubiano (Chief Financial Missioner, Diocese of Rochester); The Rt. Rev. John Smylie (Bishop, Diocese of Wyoming); Jeff Tyrakowski (Consultant, Ernst Tyrakowski Benefits, LLC); Anne Wagner (Operations Manager and Convention Coordinator, Diocese of Iowa); The Very Rev. George Werner (Dean Emeritus, Trinity Cathedral, Diocese of Pittsburgh); and Lisa White (Parish Administrator and Controller, St. Paul’s Episcopal Church, Diocese of Indianapolis).

### **Response to Resolution C042: Extend Implementation Period for the Lay Employee Pension Plan**

In 2009, the 76th General Convention passed Resolution A138 and its associated Canon establishing a church-wide Lay Employee Pension System (LPS). The resolution requires that pension benefits be provided to lay employees scheduled to work at least 1,000 compensated hours annually for any domestic diocese, parish, mission, or other ecclesiastical organization or body subject to the authority of the Church; calls for CPF to administer this system; and requires that if a defined contribution pension plan is provided, it must be CPF’s Lay DC Plan or, in the case of schools, either the Lay DC Plan or a TIAA-CREF-sponsored pension plan. In July 2012, the 77th General Convention passed Resolution C042 affirming the requirements of Resolution A138, and extending the period, for schools only, to achieve the full employer base and matching contributions until January 2018 according to a specific year-by-year schedule delineated by that resolution.

Over the past triennium, schools have continued to enroll in defined-contribution retirement plans administered by CPF or TIAA-CREF. CPF is encouraging and educating school administrators around compliance with the requirements of Resolutions A138 and C042 through a series of direct mailings and web-based and in-person presentations. In addition to direct work with schools, CPF has worked in collaboration with diocesan leadership, the National Association of Episcopal Schools (NAES), and other regional school associations to educate and engage schools around the requirements. CPG continues to provide online resources, including webinars and calculators, for administrators, employers, and employees. In both 2012 and 2014, CPG hosted web-based presentations to schools in collaboration with NAES to answer questions regarding these resolutions, including the timeline for compliance with the phase-in requirement. CPG participated in NAES's biannual conference in 2012 and 2014 and the biannual conference of the Southwestern Association of Episcopal Schools in 2013, and will participate again in 2015.

### **Response to Resolution A137: Strengthening Families**

The Medical Trust has recently completed extensive research on the medical necessity, prevalence, cost, and typical coverage levels for infertility treatment; and the results of this research and analysis have been key components of our ongoing planning. Effective January 1, 2015, Medical Trust plans include expanded coverage for the treatment of infertility.

### **Response to Resolution A140: Advocate for Maternal and Infant Health**

All Medical Trust plan provisions are in compliance with current ACA provisions related to women's health. The Medical Trust has developed a formal, ongoing process to ensure that the medical plan provisions and policies remain current with ACA guidance, specifically in the area of women's health and preventive care. Effective January 1, 2015, Medical Trust plans include expanded coverage for the treatment of autism to include coverage for Applied Behavioral Analysis.

### **Response to Resolution A076: Strengthen Small Congregations**

CPF regularly conducts ongoing surveys, focus groups, and other meetings around the Church to collect feedback from the individuals and institutions CPG serves, including small congregations. During this triennium, three CPG management team members met with the Standing Commission on Small Congregations and discussed issues such as pensions, medical and other employee benefits, and demographic data related to small parishes.

Church Publishing Incorporated (CPI), an affiliate of CPF, also has taken action in response to this resolution. CPI submitted a list of resources for the General Convention booklet entitled, *Hope & Action: Abundant Small Congregations*. CPI published a number of resources during the past triennium that address this resolution, including *Marked for Mission: Youth in Action* (2014), which addresses the Five Marks of Mission; "Building Faith," a regularly published (through 2014) blog targeted to small congregations; and several books for small churches, including *Big Lessons from Little Places: Faithfulness and the Future in Small Congregations*. CPI's Weaving God's Promises curriculum and the Rite Series e-products have tiered pricing structures so that small churches can afford them.

### **Response to Resolution A049: Authorize Liturgical Resources for Same-Gender Blessings**

CPI has printed "I Will Bless You and You Will Be A Blessing," the same-gender blessing rite authorized for use by General Convention, in English, Spanish, and French. At the request of the Standing Commission on Liturgy and Music, both a PDF and a Word document of this liturgy, along with a one-page explanation of its theological foundations, have been made available at no cost on <http://www.episcopalchurch.org> in all three languages, and a link to it is provided on the CPI website at <http://www.churchpublishing.org>. CPI has



included the liturgical text in the e-product Rite Stuff 2.0 and has made available, through Morehouse Church Supplies, a souvenir version of the liturgy similar to the gift editions of the BCP text for Holy Matrimony.

**Response to Resolution A055: Authorize Daily Prayer for All Seasons**

In August 2014, CPI published the volume, *Daily Prayer for All Seasons* in both English and Spanish and made it available as an e-book in both languages. A PDF of the text is available at no cost on: <http://www.episcopalchurch.org>. A deluxe gift edition of the English text is scheduled for publication in January 2015.

In the event of a conflict between the information contained in this report and the official plan documents, the official plan documents will govern. The Church Pension Fund and its affiliates retain the right to amend, terminate, or modify the terms of any benefit plans described in this report at any time, without notice, and for any reason.

# BOARD OF TRUSTEES OF THE GENERAL THEOLOGICAL SEMINARY OF THE EPISCOPAL CHURCH

## Summary of Work

**Mandate:** To prepare men and women for both lay and ordained ministry in the Church.

Established by resolution in 1817, the General Theological Seminary was the first seminary of The Episcopal Church and the only one founded by the General Convention. In 1827, General moved to its current location on farm land given by Clement Clarke Moore, who was a parishioner at Trinity, Wall Street. The establishment of General Seminary gave rise to the neighborhood of Chelsea, currently one of the most vibrant neighborhoods in New York City. It was the express decision of the Convention that the Seminary be in New York City, and General's location remains an essential aspect of its character and mission. Throughout its 198 years, in good times and bad, General has had an unwavering commitment to outstanding academic achievement and continues that tradition today.

Shortly after General Convention in 2012, General Seminary completed *The Plan to Choose Life*, a restructuring strategy that lifted the Seminary out of its immediate financial crisis and into a place where it is now debt-free and continues to build its endowment. In the years since then, the annual operating deficit has been reduced substantially, and General is even closer to operating with a balanced budget. The Seminary's assets currently include an operating reserve that gives it time to achieve this goal. There are still financial challenges to be faced, but through rigorous fiscal discipline and a refreshed outlook on seminary education, General Seminary is in a position to meet these challenges.

In 2013, the Board of Trustees elected The Very Rev. Kurt H. Dunkle as the 13th Dean and President. This action reunited the two roles, which had been separated during the focus on the financial future of the Seminary. Dean Dunkle has brought a renewed perspective to General. "We are the seminary for the entire church, not just one aspect or discrete group," he said upon his election. "We need to embrace the meaning and importance of being The *General* Theological Seminary in preparing for the leadership of the entire church."

Under Dean Dunkle's leadership, General Seminary is addressing, head-on, the changing world and the changing Church. This rapid reshaping has not been without some disruption — change is always painful, but it is essential to ensure the viability of General. We know that others in the seminary system are struggling with many of the same issues.

A core component of General's new outlook is the implementation of *The Way of Wisdom*, which includes *The Wisdom Year*. Announced in spring 2014, *The Way of Wisdom* integrates all disciplines of formation in seminary education rather than separating academics, training, and experience. *The Way of Wisdom* inspires students to interpret and learn from every aspect of their time in seminary — from Chapel service and classes to parish ministry and the experience of living in New York City. Visiting experts offer lectures and workshops that help students to hone, throughout their three years at General, such real-world ministry skills as financial management, stewardship, and pastoral leadership.

The components of discipline integration have already begun, and some students are already working in a pilot of *The Wisdom Year*, a new form of practical training that will allow General graduates to "hit the ground running" at their job placements in the real world.

In their final year, *The Wisdom Year*, MDiv students synthesize their entire seminary education through practical experience that goes beyond field placement by placing the student at a real-world, paid, part-time

position in a ministry setting. The students are given support, mentoring, and tools to connect this experience to their academic pursuits on campus. In a single move, General Seminary is creating an environment that goes well beyond knowledge while wading into *wisdom*, reducing the cost of seminary tuition and housing by one-third, and meeting the growing need of the 400 Episcopal churches in the area for eager, theologically trained pastors and leaders on a rotating basis.

The program began its pilot year in fall 2014 with the placement of two MDiv seniors in paid, part-time positions at parishes in General's wide geographic reach. In fall 2015 the pilot program will expand, allowing current students the option to participate and providing new students with the full three-year *Way of Wisdom* program, which culminates with *The Wisdom Year*.

The Church responded to the announcement of *The Way of Wisdom* with a vote of approval and support by sending students to General. The Seminary's fall 2014 incoming class of 34 was the largest seen in several years. At their February 2015 meeting, the trustees of General Seminary also affirmed *The Way of Wisdom* and *The Wisdom Year* as a creative and effective response to the needs of the 21st-century Episcopal Church. The Board also discussed how to advance the core programming to effectively implement the *Wisdom* curriculum and formation.

You are invited to find out more about *The Way of Wisdom* at <http://www.gts.edu/wisdom>.

Through *The Plan to Choose Life* and the recent additions to its core program, General Seminary now has renewed buildings, renewed programs, and renewed finances; and is now able to utilize these to support the good work it has been doing for 198 years. In this process, General Seminary seeks to add to its commitment to outstanding academic achievement those things necessary for leadership in the changing Church.

In two years, The General Theological Seminary will be marking 200 years since its establishment by General Convention. Having weathered the financial restructuring, and in working through disruptions that result from rapid changes, the Seminary is in a position to adapt seminary education to a changing Church and to continue serving the Church for the next 200 years and beyond.

# DISCIPLINARY BOARD FOR BISHOPS

## Membership

The Rt. Rev. Dorsey Henderson, Jr., *Chair*, 2015  
Mr. Joseph Alarid, 2015  
The Rt. Rev. Ian Douglas, 2018  
The Rt. Rev. Dan Edwards, 2015  
Mr. William Fleener, Jr., 2018  
The Rt. Rev. Dena Harrison, 2018  
The Rt. Rev. Herman Hollerith, 2018  
The Rt. Rev. J. Scott Mayer, 2018  
Ms. Josephine Powell, 2015  
The Rev. Canon Jesus Reyes, 2015  
Ms. Diane Sammons, 2015  
The Rev. Dr. Angela Shepherd, 2018  
The Rt. Rev. Prince Singh, 2018  
The Rev. Peggy Tuttle, 2018  
The Rev. Canon Robert Two Bulls, Jr., 2015  
The Rt. Rev. James Waggoner, Jr., 2015  
The Rt. Rev. Catherine Waynick, 2015

## Summary of Work

**Mandate:** (Title IV, Canon 17, Section 3) “The Disciplinary Board for Bishops is hereby established as a court of the Church to have original jurisdiction over matters of discipline of Bishops, to hear Bishops' appeals from imposition of restriction on ministry or placement on Administrative Leave and to determine venue issues as provided in Canon IV.19.5.

The Disciplinary Board for Bishops shall consist of ten Bishops elected at any regularly scheduled meeting of the House of Bishops, and four Priests or Deacons and four lay persons initially appointed by the President of the House of Deputies with the advice and consent of the lay and clergy members of the Executive Council and thereafter elected by the House of Deputies.

All lay persons appointed to serve shall be confirmed adult communicants in good standing. Members of the Board shall serve staggered terms of six years, with terms of one half of the Bishops and one half of the lay persons, Priests and Deacons collectively expiring every three years, with the first expirations occurring at the end of the year 2012.”

# EPISCOPAL CHURCH BUILDING FUND

## Membership

The Rt. Rev. Sean Rowe, *Chair*  
The Rev. Ruth Woodliff-Stanley, *Vice Chair*  
Ms. Julia M. Groom, *President*  
Ms. Sally D. O'Brien, *Vice President, Non-Trustee Staff*  
Ms. Mary Lou Ivey, *Treasurer*  
Dr. Heidi Schleicher, *Secretary*  
Mr. Steve Abdow  
Dr. Walter Cabe  
Dr. Thomas Nutt-Powell  
Ms. Anne Wagner  
Ms. Bobbi Yeo  
Paul Cooney, Esq., *Legal Counsel*

## Summary of Work

**Mandate:** The Episcopal Church Building Fund (ECBF) was established by the General Convention in 1880 as the American Church Building Fund Commission, a self-supporting, autonomous agency of The Episcopal Church. The goal of the ECBF is to help congregations build and to use their buildings to enhance mission. To this end, the ECBF provides:

### I. BUILDING LOANS

The ECBF makes non-mortgage loans to Episcopal congregations and organizations. Loans are made for building projects, renovations, repairs, improvements, refinancing, and the purchase of land or buildings. This includes church buildings, schools, rectories, and diocesan camps and buildings.

Our fund was created by gifts from church members and dioceses to create a revolving loan fund to expand The Episcopal Church. When borrowing through the ECBF, interest payments are reinvested to support the work of the Church. As loan demand increases, additional monies are secured through a Debenture investment program with Episcopal parishes, dioceses, and organizations.

We are a partner in the planning process. If needed, we work with congregations to ensure that they have a good building or purchase plan, and a viable means of repayment. If the congregation is planning a very large project, an ECBF loan can be a portion of the financing package. Often, the leverage of church-based financing can support a commercial loan.

Current terms for ECBF loans:

- Borrow up to \$1,000,000; larger amounts are possible.
- Fixed interest rate for the life of the loan; the current rate is 6.5 percent
- Loans are non-mortgage, requiring no lien on the property and no attorney fees or closing costs
- Terms are up to 15 years
- Repayment is on a regular monthly amortization schedule
- Origination fee of 2 percent
- No pre-payment penalty fee

## II. 'BUILDINGS FOR A NEW TOMORROW' NATIONAL SYMPOSIUM

Each spring, a national, mind-altering summit — a gathering of forward-thinking, innovative, action-oriented attendees — is held to change the way we use church buildings and grounds. Broad ecumenical participation has led this to be a fully ecumenical event.

## III. RECASTING OF BUILDING ASSETS CONSULTATION PROCESS

The ECBF has developed a process by which to use real-estate assets to develop financial self-sustainability, and to help congregations increase their relevance in the community and build mission and value in the world around them.

Objectives:

- Develop a congregation's financial self-sustainability through the creative and innovative use of their buildings.
- Increase relevancy of the congregation to the community.
- Disperse or reallocate real-estate assets that are redundant or cannot be sustained.

A customized curriculum is designed for each group of participants. The framework below is standard; adjustments are made as needed. ECBF facilitators are onsite for training sessions. Between on-site visits, coached WebEx meetings are conducted with each congregation to ensure accountability, provide neutral advice, access professional resources, and promote success-focused solutions.

Assignments are given to stimulate creative problem solving, increase resources, develop connections in the community, and keep the congregation engaged with, and supportive of, developing ideas. Communication with the diocesan leadership is maintained throughout the process.

The process invigorates parish life and creates new, dynamic relationships within the community, resulting in a common mission and in new people experiencing a fulfilling relationship with the parish.

### **Goals and Objectives for the Coming Triennium**

The ECBF met and exceeded the goals it set for the previous triennium, doubling its loan capacity; updating the manual for congregations conducting building projects and the document on liturgical space design; and increasing web-based video resources.

**Financial:** To increase the capacity to make loans meet the variety of needs of dioceses and congregations.

**Resources:** To expand the web-based platform on which readers relate and communicate on building issues; to maintain a web site with video and links to resources for congregations.

**Consultation:** To expand the capacity to provide consultation services to congregations and to deepen ecumenical partnerships and collaboration.

# EPISCOPAL RELIEF & DEVELOPMENT BOARD

## Membership

The Rt. Rev. Michael B. Curry, *Chair*  
Dr. Robert W. Radtke, *President, Ex Officio*  
Ms. Abigail Nelson, *Senior Vice President for Programs*  
Ms. Esther Cohen, *Chief Operating Officer*  
Ms. Mary Carr, *Deputy to the President*  
Mr. Franklin Berger  
Ms. Meredith Brown  
Dr. Pearl Chin  
Ms. Lindsay Coates  
Ms. Josephine Hicks  
Ms. Sharon Hilpert  
Mr. Neel Lane  
The Rt. Rev. Jeffrey D. Lee  
Ms. Flo McAfee  
Mr. Tucker Moody  
Ms. Judith Morrison  
Ms. Constance Perry  
The Rev. Genevieve Razim  
The Rt. Rev. Prince G. Singh  
The Rev. Canon E. Mark Stevenson  
Mr. Thomas W. Stoeber  
Mr. N. Kurt Barnes, *Ex Officio*  
The Most Rev. Katharine Jefferts Schori,  
*Presiding Bishop and Primate, Honorary Chair, Ex Officio*  
The Rt. Rev. Stacy Sauls, *Ex Officio*

### *Representation at General Convention*

Dr. Robert Radtke is authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** Episcopal Relief & Development is a compassionate response of The Episcopal Church to human suffering in the world. Hearing God's call to seek and serve Christ in all persons and to respect the dignity of every human being, Episcopal Relief & Development serves to bring together the generosity of Episcopalians and others with the needs of the world.

Episcopal Relief & Development faithfully administers the funds that are received from the Church and raised from other sources. It provides relief in times of disaster and promotes sustainable development by identifying and addressing the root causes of suffering.

Episcopal Relief & Development cherishes its partnerships within the Anglican Communion, with ecumenical bodies, and with others who share a common vision for justice and peace among all people.

Our mandate comes from Jesus' words found in Matthew 25:

Lord, when was it that  
 We saw you hungry and gave you food?  
 We saw you thirsty and gave you something to drink?  
 We saw you a stranger and welcomed you?  
 We saw you sick and took care of you?  
 We saw you in prison and visited you?  
 'Truly I tell you, just as you did it to one of the least of these who are  
 members of my family, you did it to me.'  
 – Matthew 25:37-40 (NRSV)

### **Millennium Development Goals**

At Episcopal Relief & Development, we use the Millennium Development Goals as a framework to guide our efforts and help us measure the impact of our programs. Each of our core program areas and all of our programs work to achieve one or more of the goals.

At the 77th General Convention in 2012, The Episcopal Church called upon individuals, parishes, and dioceses to recommit to the MDGs. Through resolution A011, it reaffirmed the Church's commitment to the Millennium Development Goals as a primary mission priority through 2015. The Church pledged 0.7 percent of its annual budget for the 2013-2015 triennium to support Episcopal Relief & Development's programs that work to achieve the MDGs. Some of those key programs are highlighted below.

### **Our Programs**

Collaborating with church and ecumenical partners in nearly 40 countries, we work with more than three million people each year through programs in four core areas. The following are highlights of the work that Episcopal Relief & Development does in partnership throughout the Anglican Communion:

#### ***Alleviating Hunger and Improving Food Supply***

*Agriculture and Rural Development highlight:* In November 2013, Episcopal Relief & Development was awarded a grant through the Grand Challenges Explorations initiative funded by the Bill & Melinda Gates Foundation, for an innovation with women smallholder farmers in Northern Ghana.

Working together with Ghanaian partner ADDRO (the Anglican Diocesan Development and Relief Organization), the project promotes an innovative, labor-saving strategy for women smallholder farmers: the donkey plough. Most women farmers in sub-Saharan Africa do not have access to oxen for farming and are consigned to grueling and time-consuming labor using hand tools.

Women's access has been limited by cost, cultural taboos, and the difficulty of managing oxen due to their large size. In the 1990s, a plough was developed for use by a single donkey, which would be more affordable and practical for women and would save 18 or more days of labor per hectare of land versus using a hand hoe alone. However, the donkey plough has not been widely popularized to date, and cost is a major obstacle.

Episcopal Relief & Development and ADDRO give women smallholder farmers the opportunity to acquire the necessary equipment, along with improved seeds and fertilizer, through affordable credit. The project is testing two credit options through a revolving loan fund designed to be financially sustainable, and participants are receiving skills training in donkey care, farm business management, and agricultural



techniques. The loan amount covers the cost of a donkey, a plough, and a cart, enabling the owners to earn extra income and to repay their loans more quickly by renting the donkey set to others for farming and transporting goods.

**Promoting Health and Fighting Disease**

*Health highlight:* Episcopal Relief & Development is working with the Anglican Diocese of Bo in Sierra Leone and with the Episcopal Church of Liberia in response to the Ebola epidemic that has killed thousands of people since the current outbreak began in March 2014. Through its local partners, the organization is supporting awareness-raising efforts and providing food supplies in addition to personal protection equipment and disinfectants to under-resourced hospitals and clinics in affected areas.

**Creating Economic Opportunities and Strengthening Communities**

*Economic Opportunities highlight:* With five generations depending on the income from their small home bakery, a micro-finance loan made a huge difference to María Elena and Verónica, a mother and daughter in Texiguat, Honduras. Episcopal Relief & Development works with the Episcopal Diocese of Honduras and its Anglican Agency of Development (AANGLIDESH) to promote community-based savings and education groups and to offer individual and collective micro-finance loans. Both programs provide business and finance training to ensure the success of the investments and to keep the cycle going for new entrepreneurs.

**Responding To Disasters and Rebuilding Communities**

*International Disaster Program highlight:* Episcopal Relief & Development joined with a working group of 12 global church partners to create the Pastors & Disasters Toolkit. The Toolkit not only adapts many existing resources, but also creates new ones to meet the needs of the Anglican context. This is the first of its kind for the Anglican Communion, and was born out of the idea that church communities can continue to learn from each other and enhance our collective strength. The Toolkit focuses on Four Core Competencies: Community Mobilization, Risk Assessment, Disaster Risk Reduction Implementation, and Disaster Response.

*U.S. Disaster Program highlight:* On October 29, 2012, "Superstorm" Sandy pummeled the Eastern Seaboard of the United States. In response, Episcopal Relief & Development partnered with the Episcopal Dioceses of Easton, New Jersey, Newark, Long Island, and New York to better serve those affected by the storm. Communities throughout the region continue to recover from the storm, and many homes remain uninhabitable. The Episcopal Sandy Recovery Effort continues to work with volunteers to help restore homes and livelihoods.

**Our Methodology: Asset-Based Community Development**

Our programs combine multiple approaches in an integrated strategy, using local gifts and resources to respond to challenges. Since they come from within, these solutions are sustainable and customized for each community.

Asset-Based Community Development (ABCD) is an approach that identifies and utilizes the capacities and skills of people and their neighborhoods. It is a methodology for sustainable development based on a community's assets versus solely its needs. An ABCD approach does not create or bring development to a community from outside, but rather energizes change and development from within.

Episcopal Relief & Development seeks to transform how it views itself in relationship to its partners, communities, colleagues, and supporters. Utilizing this approach strengthens its role as a catalyst,

empowering people to engage in their own development and recognizing and reinforcing their existing assets.

### **Strategic Planning**

In 2009, Episcopal Relief & Development launched its first strategic plan to set institutional priorities and guide the organization's work. Each triennium, the organization revisits its goals and priorities and drafts a new plan. In the three-year period from 2012 to 2015, commitments were made in the following areas: International Programs, US Disaster Preparedness and Response, Engagement, Funding, Visibility & Awareness, and a focus on the organization's 75th Anniversary (celebrated in 2015).

### **2015: Episcopal Relief & Development Celebrates 75 Years of Healing a Hurting World**

In 2015, Episcopalians, friends, and partner agencies around the globe are joining together to celebrate Episcopal Relief & Development's 75th Anniversary. This 75-week celebration, which began during the summer of 2014 and will continue through the end of 2015, is a way to say "Thank You" to the Church and friends for helping Episcopal Relief & Development continue this important work.

Led by a volunteer Steering Committee and an Honorary Committee co-chaired by Presiding Bishop Katharine Jefferts Schori and her predecessors — The Rt. Rev. Frank T. Griswold and The Rt. Rev. Edmond L. Browning — the 75th Anniversary Celebration provides many opportunities to engage more deeply with Episcopal Relief & Development's programs and to get involved in promoting and sustaining the organization's work. These opportunities are detailed in a special web section at <http://www.episcopalrelief.org/75>, which also includes a social media hub around the celebration hashtag #AllHands75, and an interactive historical timeline.

One of the cornerstones of the celebration is a traveling photo exhibition, which features 33 iconic images of Episcopal Relief & Development's work, along with in-depth explanations and personal reflections through an accompanying e-docent app available for iPhone and Android phones and devices. Having previewed at Executive Council in June 2014, the exhibition officially launched at New York City's Cathedral of St. John the Divine and continues its national tour with stops in at least 25 cities.

Similarly, the organization's 75 Stories Project provides a window into the programs, events, and personalities that have shaped the last 75 years and are changing lives today. Individuals and groups are encouraged to offer reflections and stories through the Share Your Story page, and to inspire and energize others to join the celebration.

We invite you to join this celebration so that we can thank you for your support. Episcopal Relief & Development will host a 75th Anniversary event at the 78th General Convention of The Episcopal Church in Salt Lake City. We do hope you will join us.

# FORWARD MOVEMENT

## Membership

The Rev. Gary Jones, *Chair*  
Mr. Mike Phillips, *Treasurer*  
The Rev. Nancy Frausto  
Ms. Pamela Wesley Gomez  
Mr. Carlos de Jesus  
The Rt. Rev. Daniel Martins  
The Rev. Christine McSpadden  
Ms. Mimi Murley  
Mr. Belton Ziegler  
The Rt. Rev. Thomas Breidenthal, *Ex Officio*  
Ms. Richelle Thompson, *Deputy Director and Managing Editor*  
Ms. Miriam McKenney, *Development Manager*  
Ms. D. Jane Lyman Paraskevopoulos, *Director of Business Operations*  
The Rev. Jay Sidebotham, *Director of RenewalWorks*  
Ms. Heidi Weaver, *Marketing Manager*  
Ms. Tania Jones, *Executive Assistant*

The Presiding Bishop serves as president of the Board and appoints its members. Forward Movement's offices are located in Cincinnati, Ohio, as they have been since inception. The executive director, The Rev. Canon Scott Gunn, oversees a staff of 12 full-time and 14 part-time people. While most staff members are based in Cincinnati, others are based in Illinois, North Carolina, elsewhere in Ohio, and in Texas.

## Summary of Work

**Mandate:** Forward Movement is an agency of The Episcopal Church chartered by the 51st General Convention in 1934 “to reinvigorate the life of the church and to rehabilitate its general, diocesan, and parochial work.”

**Meetings:** The Forward Movement Board of Directors meets twice each year. This triennium, the Board has met in Cincinnati, Los Angeles, and Washington, DC.

From its inception, Forward Movement has understood that for The Episcopal Church to be healthy, its congregations must be healthy. For congregations to be healthy, they must be filled with disciples rather than habitual Christians. Our work, then, is to encourage discipleship and evangelism.

Our first publication was a Lenten devotional focused on discipleship in 1935. *Forward Day by Day* was the immediate successor to that first publication and has been published continuously since then. Today, *Forward Day by Day* is published as a print quarterly with a circulation of just over 300,000 copies per quarter, over 90 percent of which is in The Episcopal Church.

We have subscribers in nearly every province of the Anglican Communion and in more than 60 nations, with the largest number outside the United States going to the Anglican Church of Canada. In addition to print, the devotional is available as an e-book, on a smartphone app, by email, and through our social-media channels (Facebook and Twitter). More than 112,000 copies of *Forward Day by Day* — along with other literature — are distributed free of charge each year to prisons, military bases, hospitals, and nursing homes.

We have expanded our resource offerings with more than ten books published per year, along with booklets and pamphlets. The general focus is discipleship, including scripture study, daily devotions, liturgical material, and prayer. While the historic focus of Forward Movement has been print publications, we have moved beyond print to encompass online and digital products. In addition to books, booklets, and pamphlets, we produce digital products including apps, daily emails, e-books, websites, and videos. In addition to more traditional devotionals, we have supported seasonal, light-hearted offerings such as *Lent Madness* and *50 Days of Fabulous*.

Material for Latino/Hispanic Episcopalians and seekers is an important part of Forward Movement's ministry. This triennium has seen the launch of *¡Adelante!* as a new brand for a Latino/Hispanic audience, along with increased staffing and additional publications. Our flagship devotional is available in Spanish as *Adelante Día a Día* in print, as an ebook, on social media, and via other channels.

This triennium, we have focused especially on partnership work. We now carry out work in collaboration with: the Center for Biblical Studies, ChurchNext, Confirm not Conform, the Episcopal Church Foundation, Episcopal Church Women, the Episcopal Diocese of Texas, the Episcopal Network for Stewardship, Episcopal Relief & Development, the Missionary Society, and the Society of St. John the Evangelist (SSJE).

Forward Movement has launched RenewalWorks, a new donor-funded ministry aimed at encouraging congregations to assess their spiritual health and vitality and to respond based on what they learn in their assessment. To date, more than 60 Episcopal congregations have undertaken this work, and a good deal of data on the spiritual health — and challenges — of The Episcopal Church have been amassed.

Some early insights have been published in a book called *Footsteps: Making Spiritual Growth the Priority* (Forward Movement, 2014). Led by The Rev. Jay Sidebotham, RenewalWorks is expanding to offer more resources to more congregations.

## Budget

While the annual budget was \$1.6 million in 2012, the organization has expanded considerably in this triennium. The current combined annual budget is just over \$2.9 million. Forward Movement is self-sustaining. Funding comes from sales, donations, grants, and investment income. The largest expense is personnel costs. Other major expenses include printing and publication purchase, warehousing and shipping, marketing, and general & administrative. No funding is requested from the General Convention budget.

# GENERAL BOARD OF EXAMINING CHAPLAINS

## Membership

### **Bishops**

The Rt. Rev. Dr. Barry R. Howe, *Chair, (Retired)*, 2015  
The Rt. Rev. Dr. Larry R. Benfield, *Vice Chair*, 2015\*  
The Rt. Rev. Dr. R. William Franklin, 2018  
The Rt. Rev. Sean W. Rowe, 2015

### **Clergy with Pastoral Responsibilities**

The Rev. Canon Dr. Stephen C. Holmgren, 2018  
The Rev. Dr. Stephen E. Moore, 2015  
The Rev. Dr. Danielle E. Tumminio, 2018  
The Rev. Peter T. Vanderveen, 2018

### **Members of Faculties**

The Rev. Dr. Frank G. Kirkpatrick, 2018  
The Rev. Canon Dr. Lloyd A. Lewis, 2015  
The Rev. Dr. Patrick L. Malloy 2018  
The Rev. Dr. Paula D. Nesbitt, 2018  
The Rev. Dr. Frederick W. Schmidt, Jr., 2015

### **Lay Persons**

Br. Reginald-Martin Crenshaw, 2015  
Dr. Frederick W. Gerbracht, 2018  
Dr. Sandra D. Michael, 2018  
Dr. Donn F. Morgan, 2015  
Ms. Janet P. Roth, 2018  
Dr. Kristine T. Utterback, 2015  
Mr. Duncan C. Ely, *Executive Director and GOE Administrator*  
Ms. Margaret A. Leach, *Staff*

\*eligible for additional three-year term

### *Changes in Membership*

The GBEC declined to fill three vacancies caused by a position inadvertently unfilled by the last General Convention and by the subsequent resignations of The Revs. Elena Thompson and Tanya R. Wallace.

### *Representation at General Convention*

Bishop Larry R. Benfield and Deputy Stephen E. Moore are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** The canonical mandate for the General Board of Examining Chaplains [Canon III.15.2 (a)] reads: “The General Board of Examining Chaplains, with professional assistance, shall prepare at least annually a General Ordination Examination covering the subject matter set forth in Canon III.8.5 (g) and (h), and shall conduct, administer and evaluate it in respect to those Candidates for Holy Orders who have been identified to the Board by their several Bishops.”

The 2013-15 triennium has been one of reimagining, restructuring, and transformation. The GBEC continued its professionally vetted policy of evaluating the GOE at a single readers' meeting at the cost-effective Episcopal Kanuga Conferences, Inc., in Hendersonville, North Carolina, to foster a higher level of training and greatly improved consistency of evaluation.

Annual feedback from consultants, volunteers, diocesan officials, and seminary administrators continues to be positive both as to the high level of consistency in evaluations and to the timely distribution of the results. In carrying out its canonical responsibilities, the Board:

- Gathered at its annual meetings on October 1-4, 2013, October 7-10, 2014, and October 6-9, 2015 — all at Kanuga Conferences, Inc., Hendersonville, North Carolina — and evaluated the GOE at its readers' meetings on February 4-8, 2013, February 3-7, 2014, and February 2-6, 2015.
- Agreed to continue reimagining the GBEC and the GOE with assistance from diocesan and professional consultants to improve efficiency and training, to lower costs, and to provide a GOE that reflects TEC's changing needs while ensuring adherence to the latest and most professional psychometric standards.
- Worked throughout each year individually, in groups and as a whole board to prepare the GOE and supporting materials; Question-Writing Team chairs met by videoconference in June of each year; and the entire Board convened in October of each year to prepare the final draft of the GOE and to produce the background material for the guidance of the volunteer readers who evaluated the candidates' papers.
- Arranged for the electronic administration of the GOE annually at all Episcopal seminaries and at more than 50 additional locations throughout the United States and abroad to 189 candidates in 2013, 199 in 2014, and 192 in 2015.
- Recruited, trained, supervised, and assisted volunteer readers, editors, and office staff in the annual professionally vetted evaluation process while annually increasing efficiency and reducing by half the size of the volunteer corps.
- Reported annually the examination results and recommendations to candidates, their diocesan authorities, and seminary deans.
- Informed seminary deans about how their candidates compared with those from other seminaries; in this comparison, the GBEC did not identify seminaries by name but by an arbitrary alphabetical designation.
- Through a Planning Committee and as a whole board, evaluated each year's GOE, its administration and results, and its volunteer readers, editors, and office staff; adapted and altered subsequent exams and procedures in response to solicited feedback from candidates, volunteers (readers, editors, and office staff), diocesan authorities, and others, including a professional consultant.
- Continued to improve a dedicated web site to impart information about the GBEC and its ministry and the GOEs, and to transmit GOE questions, receive GOE answers, and transmit results to candidates, bishops, and seminary deans — improving communication and substantially reducing postage and printing costs.
- Created an extensive set of Frequently Asked Questions (FAQs) for the GBEC website and for electronic and print distribution explaining the GBEC's history and purpose, the GOE and its administration and evaluation, and tips for taking the exam; and posted the past 10 GOEs on its website.
- Developed standards for each of the seven canonical areas, widely distributed them throughout TEC for feedback, and published them on the GBEC website.
- Reported to the interim meetings of the House of Bishops, as required by Canon.
- Appointed a subcommittee of the Board to study GBEC composition and size, and accepted its report to reduce Board size from 22 to 12.
- Reduced by half both length and costs of Board and readers' meetings effective next triennium.
- Accepted the resignations of The Revs. Elena Thompson and Tanya R. Wallace.

## Goals and Objectives for the 2016-2018 Triennium

The GBEC's principal objectives during the next triennium will be to continue to fulfill its canonical responsibilities to develop annually a General Ordination Examination; to administer it to certified candidates; to evaluate the results; and to report the results to candidates, their diocesan authorities, and their seminary deans. In addition, the GBEC will:

- Continue to create examinations that will provide diocesan authorities with useful information for diagnosis and assessment of their candidates;
- Continue to provide seminaries and dioceses with statistics about performance on the annual GOE;
- Continue to reduce costs, leverage resources, improve efficiency, increase use of electronic technology, and respond to the needs of TEC with a professionally designed and administered GOE;
- Continue refining the GBEC website to reflect the GBEC's transparency about its work, to provide easy access to information about the GBEC and the GOE, and to make the electronic administration of the GOE as user-friendly as possible;
- Continue to work with other church-wide, provincial, and diocesan groups involved in theological education to better serve bishops, students, and their dioceses;
- Continue a church-wide dialogue about theological education, the best way to test for it, and ways in which the GBEC can adapt to be of greatest service to TEC.

## PROPOSED RESOLUTIONS

AO41: AMEND CANON III.15.1-5 — OF THE GENERAL BOARD OF EXAMINING CHAPLAINS

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church replace existing Canon III.15.1-5 with the following canon:

CANON III.15.1, 2, and 3 (replacing all existing sections)

Sec. 1. There shall be a General Board of Examining Chaplains, consisting of four Bishops, ~~six Priests with Pastoral cures or in specialized ministries, six members of accredited Seminary faculties or of other educational institutions, and six Lay Persons. and eight other members.~~ The members of the Board shall be elected to ~~six-year terms~~ by the House of Bishops and ~~confirmed by the House of Deputies from nominees presented by the existing Board and the Presiding Bishop,~~ one-half of the members ~~in each of the foregoing categories being elected and confirmed at each regular meeting of the General Convention for a term of two Convention periods not to exceed two General Conventions, except that for the first election following the approval of this canon, one half of the members shall be elected for a three-year term and one half for a six-year term.~~ They shall take office at the adjournment of the meeting of the General Convention ~~at which their elections are confirmed of their election,~~ and shall serve until ~~the earlier of the end of their term or the adjournment of the second regular meeting of General Convention thereafter.~~ No member shall serve more than 12 years consecutively. Additionally, the Presiding Bishop, ~~in consultation with the Chair of the Board, may appoint up to four other members for a term.~~ The House of Bishops, at any special meeting that may be held prior to the next meeting of the General Convention, shall fill for the unexpired portion of the term any vacancy that may have arisen in the interim. The Board shall elect its own Chair and Secretary, and shall have the power to constitute committees necessary ~~for the carrying on of to carry out its work.~~

Sec. 2. (a) The General Board of Examining Chaplains, with professional assistance, shall prepare at least annually a General Ordination Examination covering the subject matter set forth in Canon III.8.5 (g); and shall conduct, administer, and evaluate it in respect to those Candidates for Holy Orders who have been identified to the Board by their several Bishops.

~~(b) Whenever a Candidate has not demonstrated proficiency in any one or more of the canonical areas covered by the General Ordination Examination, The General Board of Examining Chaplains shall recommend to the Commission on Ministry, and through the Commission to the Board of Examining Chaplains, if one exists, of the Diocese to which the Candidate belongs, how the proficiencies might be attained. promptly report to each Candidate, to the Candidate's Bishop, and to the dean or other official of the educational program at which the Candidate is studying, the results of the General Ordination Examination, the examinations themselves, and the proficiency or lack of proficiency noted, along with the reasons for any lack of proficiency. The Bishop shall transmit these reports to the Standing Committee and to the Commission on Ministry.~~

~~Sec. 3. The General Board of Examining Chaplains may prepare, in each Convention period, guidelines based upon the subjects contained in Canon III.8.4(e), which guidelines shall be available to all persons concerned. shall make a report concerning its work to each regular meeting of the General Convention.~~

~~Sec. 4. The General Board of Examining Chaplains shall promptly report, in writing, to the Candidate, to the Candidate's Bishop and to the Dean of the Seminary the Candidate is attending, the results of all examinations held by them, together with the examinations themselves, whether satisfactory or unsatisfactory, making separate reports upon each person examined. The Bishop shall transmit these reports to the Standing Committee and to the Commission. Notwithstanding the results of the examinations, in no case shall the Standing Committee recommend a Candidate for Ordination under Canon III.8 until the Standing Committee has received from the Commission on Ministry a certificate to the effect that the Candidate has demonstrated a proficiency in all subjects required by Canon III.8.5(g) and (h).~~

The report of the Board shall be made in the following form: To \_\_\_\_\_ (Candidate), the Right Reverend \_\_\_\_\_, Bishop of \_\_\_\_\_ (or in the absence of the Bishop the Standing Committee of) \_\_\_\_\_: (Place) \_\_\_\_\_ (Date) \_\_\_\_\_. To the Dean of (Place) \_\_\_\_\_ (Date) \_\_\_\_\_. We, having been assigned as examiners of A.B., hereby testify that we have examined A.B. upon the subject matter prescribed in Canon III.7. Sensible of our responsibility, we give our judgment as follows: (Here specify the proficiency of A.B. in the subject matter appointed, or any deficiency therein, as made apparent by the examination. (Signed) \_\_\_\_\_

~~Sec. 5. The General Board of Examining Chaplains shall make a report concerning its work to each regular meeting of the General Convention, and in years between meetings of the General Convention shall make a report to the House of Bishops.~~

EXPLANATION

The General Board of Examining Chaplains currently retains a larger number of members than the other boards and commissions. As the GBEC revises the way it administers and evaluates the General Ordination Examination, it believes that the Board's size can be reduced.

With a smaller board membership, the GBEC proposes that nominees for the Board be selected by the presiding bishop and by the current board members, so that there will be assurance that people familiar with the various canonical areas of testing are represented. This proposed method of choosing board members differs from the usual procedure of nominees being proposed by the Joint Standing Committee on Nominations, but in that the GBEC's work is primarily to advise and inform bishops, this new method of nominating board members seems appropriate.



The GBEC realizes that the work of the Task Force for Reimagining the Church may result in proposals about changing the frequency of General Convention. To that end, this proposed canonical change may need to be amended to reflect that reality.

A090: AMEND CANON III.8.6(G) PREPARATION FOR ORDINATION

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church replace existing Canon III.8.5 (g) with the following canon:

CANON III.8.5 (g):

Subject areas for studying during this program of preparation shall include:

- (1) The Holy Scriptures.
- (2) ~~Church History, including the Ecumenical Movement.~~ *History of the Christian Church.*
- (3) ~~Christian Theology, including Missionary Theology and Missiology.~~
- (4) Christian Ethics and Moral Theology.
- (5) ~~Studies in contemporary society, including the historical and contemporary experience of racial and minority groups, and cross-cultural ministry skills. Cross-cultural ministry skills may include the ability to communicate in a contemporary language other than one's first language.~~
- (6) (5) ~~Liturgies and Church Music; Christian Worship and Music according to the contents and use of the Book of Common Prayer, and the Hymnal, and authorized supplemental texts.~~
- (7) (6) ~~Theory and The Practice of Ministry, including leadership, and the ministries of evangelism and stewardship in contemporary society.~~

EXPLANATION

The wording of the subject areas as contained in the canon is outdated. For example, there is as much work currently being done in interfaith studies as in ecumenical studies, and even more specifically in the very specialized area of the “Ecumenical Movement.”

Questions in Contemporary Society and in the Theory and Practice of Ministry frequently address the same or similar issues. The GBEC and its advisors and professional consultants think that clarity in evaluating answers would be increased if these two areas could be considered as a whole. Keeping the wording of the canon as simple as possible still allows testing in many of the specific areas that were added through the years by various General Conventions.

## Budget

The General Board of Examining Chaplains has reduced the number of its meetings and their attendees by a third and overall GBEC expenses by 75 percent (and office expenses by 88 percent) since the 2007-2009 triennium.

	2013 Actual	2014 Est.	2015 Est.	Total
<b>Income</b>				
Exam fees (1)	100,000	100,000	100,000	300,000
<b>Expenses</b>				
Salaries/Benefits (2)	58,479	60,493	61,808	180,780
Reader's Meetings	111 (3)	80,000	80,000	200,111
Office Expenses	<u>22,572</u>	<u>11,900</u>	<u>11,900</u>	<u>46,303</u>
Total	81,162 (3)	152,324	153,708	427,194

**Notes:**

- (1) These figures represent \$500 x the number of candidates taking the exam x estimates of 200 candidates each year.
- (2) Benefits include health insurance, pension payments, and 50 percent of Social Security.
- (3) \$40,000+ in 2010 expenses posted to different year.

### Budget Appropriation If 12-Member Board

	2016	2017	2018	Total
<b>Income</b>				
Exam fees (1)	90,000	90,000	90,000	270,000
<b>Expenses</b>				
Salaries/Benefits (2)	73,000	75,190	77,380	225,570
Reader's Meetings	33,980	33,980	33,980	101,940
Office Expenses	<u>16,695</u>	<u>16,695</u>	<u>16,695</u>	<u>50,085</u>
Total Expenses	123,675	125,685	128,055	377,415

**Notes:**

- (1) These figures represent \$500 x the number of candidates taking the exam x estimates of 180 candidates each year.
- (2) Benefits include health insurance, pension payments, and 50 percent of Social Security.

### Board Travel and Meetings

The General Board of Examining Chaplains will meet nine times during the next triennium, requiring \$20,000 for 2013, \$20,000 for 2014, and \$20,000 for 2015, for a total of \$60,000 for the triennium.

# HOUSE OF BISHOPS COMMITTEE ON PASTORAL DEVELOPMENT

## Membership

The Rt. Rev. James Edward Waggoner, *Chair*, 2015  
Mrs. Jeannie Johnson, *Secretary*  
The Rt. Rev. Clayton Matthews, 2015  
The Rt. Rev. Nathan D. Baxter, 2015  
The Rt. Rev. Oge Beauvoir, 2015  
The Rt. Rev. James Elliott Curry, 2015  
The Rt. Rev. Gayle E. Harris, 2015  
The Rt. Rev. Herman Hollerith IV, 2015  
Mrs. Gretchen Lane, 2015  
The Rt. Rev. Robert J. O'Neil, 2015  
The Rt. Rev. S. Todd Ousley, 2015  
The Rt. Rev. Jacob W. Owensby, 2015  
The Rt. Rev. Lawrence C. Provenzano, 2015  
The Rt. Rev. Luis Fernando Ruiz, 2015  
The Rt. Rev. Dean E. Wolfe, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*

### *Representation at General Convention*

Bishop Jim Waggoner is authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

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

To that end, the Committee:

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

**Meetings:** The Committee met twice per year, once in person and once via teleconference during the triennium, and at other regularly scheduled meetings of the House of Bishops.

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

1. Promotes and incorporates core values at each meeting in order to continue to develop a learning, discerning, and healing community within the House of Bishops;
2. Continues to serve as a council of advice and support to the Bishop for the Office of Pastoral Development and for the Presiding Bishop, especially regarding the re-formation of Dioceses following termination of relationships with The Episcopal Church and separation of House of Bishops members seeking new jurisdiction;
3. Works with the House of Bishops Planning Committee in the continuity of programs between House of Bishops meetings;

4. Supports collaboration and collegiality between the Spouses and Partners of Bishops of the Episcopal Church network and the House of Bishops;
5. Provides direct pastoral care to bishops and their spouses/partners;
6. Researches and reports to House of Bishops regarding appropriate use of Social Media within the House;
7. Continues discussion of Title IV concerns and revisions;
8. Continues conversations regarding the ministries, care, and support of Bishops Suffragan;
9. Assists with the discernment processes for standing committees asked to give consent throughout The Episcopal Church in elections of new bishops through a form entitled, “Questions Bishops and Standing Committees Might Consider Asking Before Offering Consent To an Episcopal Election”;
10. Monitors Episcopal elections regarding women and minorities (Resolution A144) (see report attached as Appendix);
11. Works to develop gracious norms for a newly elected bishop when that bishop’s spouse is ordained and is currently serving, or wishes to serve, within that diocese;
12. Recommends to the House of Bishops Committee on Ministry Development that it review issues concerning income replacement and disability for bishops;
13. Presented a resolution to the House of Bishops at its September 2013 meeting, for presentation at the 78th General Convention, prohibiting Diocesan staff from serving or representing the Diocese in which they are employed specifically as Deputies to General Convention, or on the Diocesan Standing Committee or Executive Board; and to bring a canonical revision to this effect to the 78th General Convention. The resolution passed the House of Bishops. (See below.)

### **Consideration of Procedures for the Election of a Bishop**

The House of Bishops Committee on Pastoral Development sent to the Committee on Ministry a proposal for a new Title III, Canon 11 “On the Election of a Bishop” with the suggestion that the Committee review the materials and then pass them along to the Committee on Canons for consideration at the 78th General Convention in 2015. The proposed changes to Title III, Canon 11 “On The Election of a Bishop” are as follows:

#### **Sec. 1: The Standing Committee**

Upon the call for an election of a Bishop in accordance with Title III, Canon 11 of the Canons of the General Convention, the Bishop shall delegate to the Standing Committee of the Diocese oversight and responsibility for the process unless it already holds this responsibility due to a vacancy in the Episcopate.

#### **Sec. 2: Pre-election Process**

Once the date for an election has been established in consultation with the Office of the Presiding Bishop of The Episcopal Church, the Standing Committee shall appoint two (2) committees to oversee the election process — a Search Committee and a Transition Committee — and shall make provisions for a petition process.

#### **Sec. 3: The Electing Convention**

The President of Convention will convene the session to call for nominations. The Standing Committee shall propose Rules of Order for the Electing Convention and oversee the election.

The Standing Committee will place in nomination the names of all persons whose names were submitted to it by the Search Committee and those who have fulfilled the petition requirements. No nominations from the floor will be permitted.

**Sec. 4: Testimonials**

Upon election, Convention will remain in session until the Canonical Testimonials are signed by a majority in each order of those eligible to vote.

**Sec. 5: Bishop and Council or Executive Board**

The Bishop and Council shall budget appropriately for the above-outlined process.

**Sec. 6: Bishop-Elect and Standing Committee**

A letter of agreement, which is signed by the Bishop-elect and the President of the Standing Committee, shall be filed in the Presiding Bishop's Office no later than 30 days prior to the Ordination.

**The Rationale**

Currently there is nothing in the Constitution and Canons pertaining to the election of a Bishop other than Article 11. Sec. 1 and Sec. 2. Section one says Bishops Diocesan and Coadjutor shall be chosen by rules prescribed by the Convention of that Diocese ..., and Section two says the person must be 30 years of age. No Canon addresses the process used in the Election of a Bishop except for one that allows for a protest within 10 days of an election (III. 11. Sec. 9 (a), and the Canon of Missionary Bishops (III. 11. Sec. 10 (c)). The House of Bishops Committee on Pastoral Development requests consideration of more guidance in our Canons pertaining to the election process used by Dioceses in an Episcopal Election. The primary intent of the proposed new Canon would be to:

- Make clear the role of the Standing Committee in the electing Diocese (a role which is now implicit only);
- Require the Standing Committee to consider the best practices of this Church in Episcopal Elections while still retaining autonomy;
- Make provisions for Background Checks; and
- Make provisions for a Petition Process.

A115: AMEND TITLE III.12.9: RECONCILIATION OF DISAGREEMENTS AFFECTING THE PASTORAL RELATION BETWEEN A BISHOP AND DIOCESE

Resolved, the House of \_\_\_\_\_ concurring, That

Sec. 9. When the pastoral relationship between a Bishop Diocesan, Bishop Coadjutor or Bishop Suffragan and the Diocese is imperiled by disagreement or dissension, and the issues are deemed serious by a Bishop of that Diocese or a two-thirds majority vote of all of the members of the Standing Committee or a two-thirds majority vote of the Diocesan Convention, any party may petition the Presiding Bishop, in writing, to intervene and assist the parties in their efforts to resolve the disagreement or dissension. The written

petition shall include sufficient information to inform the Presiding Bishop and the parties involved of the nature, causes, and specifics of the disagreements or dissension imperiling the pastoral relationship. The Presiding Bishop shall initiate such proceedings as are deemed appropriate under the circumstances to attempt to reconcile the parties, which may include the appointment of a consultant or licensed mediator. The parties to the disagreement, following the recommendations of the Presiding Bishop, shall labor in good faith toward that reconciliation. If such proceedings lead to reconciliation, said reconciliation shall contain definitions of responsibility and accountability for the Bishop and the Diocese.

*Sec. 10. Reconciliation of Disagreements Affecting the Collegial Relation between Bishops in the Same Diocese*

*When the collegial relationship between a Bishop Diocesan, Bishop Coadjutor, or Bishop Suffragan is imperiled by disagreement or dissension, and the issues are deemed serious by a Bishop of that Diocese or a two-thirds majority vote of all of the members of the Standing Committee or a two-thirds majority vote of the Diocesan Convention, any party may petition the Presiding Bishop, in writing, to intervene and assist the parties in their efforts to resolve the disagreement or dissension. The written petition shall include sufficient information to inform the Presiding Bishop and the parties involved of the nature, causes, and specifics of the disagreements or dissension imperiling the collegial relationship. The Presiding Bishop shall initiate such proceedings as are deemed appropriate under the circumstances to attempt to reconcile the parties, which may include the appointment of a consultant or licensed mediator. The parties to the disagreement, following the recommendations of the Presiding Bishop, shall labor in good faith toward that reconciliation. If such proceedings lead to reconciliation, said reconciliation shall contain definitions of responsibility and accountability for the Bishops and the Diocese.*

~~Sec. 11.~~ **Dissolution of the Pastoral Relation between a Bishop and Diocese**

**Resolution passed by The House of Bishops in September of 2013:**

**Resolved:** The House of Bishops urgently requests the Committee on Constitution and Canons to prepare a canon which prohibits Diocesan staff from serving on a Diocesan Standing Committee, and to bring this canonical revision to the 78th General Convention.

**Explanation:** It is a contradiction of role, responsibility, and some accountability for a Diocesan Staff person to also serve, without prejudice, on the Standing Committee.

## Budget

The Committee met twice per year during the last triennium, once per year in person, and once per year via conference call; and expended \$39,000.

The Committee expects to meet a similar number of times in the next triennium. This will require a budget of \$13,600 per year for a total of \$40,800.

**A116: BUDGET FOR COMMITTEE EXPENSES**

*Resolved*, the House of \_\_\_\_\_ concurring, That there be appropriated from the budget of the General Convention the sum of \$40,800 for the expenses of the House of Bishops Committee on Pastoral Development for the 2015-2018 triennium.

**The College for Bishops**

**Summary of College for Bishops Work**

The year 2014 was a banner year for the College for Bishops, with a significant increase in participation from around the Anglican Communion, especially the Anglican Church in Canada. The Conference on Orderly Transitions was named for Bishops William and Sydney Sanders, and this conference had the largest class of participants than in recent memory.

In addition to the annual programs, several new initiatives were begun, including:

- A New Survey of Bishops, Spouses, and Partners
- Project Resource, a program for Diocesan Teams, which is fully subscribed
- The First Sociological Study on the Role of Bishops
- Exploration of a possible Institute on Church Studies and Leadership

**Requested Budget Appropriation**

The College for Bishops' request is \$122,500 per year for a total of \$367,500 for the 2015-2018 triennium.

**A151: BUDGET FOR COLLEGE FOR BISHOPS**

*Resolved*, the House of \_\_\_\_\_ concurring, That there be appropriated from the budget of the General Convention, the sum of \$367,500 for the expenses of the College for Bishops for the 2015-2018 triennium.

**APPENDIX: Report on 2013-14 Episcopal Elections — A144 Task Force on Women and Other Underrepresented Groups**

**A144 Task Force charge:**

- Monitor gender and racial/ethnic ratios in Episcopal elections.
- Analyze data (including previous surveys) and recommend steps to improve gender and ethnic representation of those elected.
- Advise dioceses on the extent to which biases affect the process and those elected to the Order of Bishop.

**Notes on election monitoring and fulfillment of the A144 charge**

Statistics on gender, racial/ethnic ratios, or other forms of underrepresentation are not a required part of Episcopal elections. The monitoring data consists of voluntary reporting by dioceses and consultants involved in election processes. Diversity reported in these data represents only those who have publicly identified with an underrepresented group (based on gender, race/ethnicity, or sexual orientation).

**The Task Force tried five (5) times to secure funds to allow for interviews and surveys of all potential nominees and others, but funding was not available from:**

1. General Convention
2. The Executive Council
3. The Church Pension Group
4. A Bishop who thought funds could be found within the Diocese
5. The Constable Fund

**The Task Force is concerned that without further data-gathering and analysis to help discover the “why” behind the monitored data patterns, that:**

1. The monitored data alone offers no information that could enhance the ability to make corrective recommendations; and that
2. The second and third charge of this resolution cannot be met.

At this point we have pursued every opportunity with the Church to seek the required information to fulfill this charge.

**Summary observations from monitored data:**

1. Women's representation among finalist nominees for 2013-14 elections (42 percent at election time) was slightly greater than their percentage of candidates overall (35 percent), and is comparable to the ratio of female to male priests in the Church. This suggests that women are sufficiently represented throughout the discernment, candidate, and nominee-selection process.



*In 2014 the candidate gender ratio for one diocesan election was unusually high (89 percent female), which affected the overall total for that year. For the other four elections in 2014, the candidate gender ratio is nearly identical to that for 2013. See Table 1 and Figure 1.*

2. Since church records are not kept on race, ethnicity, or sexual orientation, only estimates can be made based on candidates who publicly identify as such. For 2013 and 2014, 11 percent of all bishop candidates publicly identified with underrepresented groups. These were: African-American, Caribbean, Hispanic, Korean-American, and gay and lesbian. Overall, they represented almost a quarter (24 percent) of all finalist nominees over this two-year period, suggesting that candidates from underrepresented groups are sufficiently represented in the nominee selection processes.

*Note: In 2013 the ratio of finalist nominees from these other underrepresented groups was three times (36 percent) that for 2014 (12 percent). See Table 3.*

3. In 2013-14, women represented 42 percent of finalists at election time, but only 18 percent of those elected (N=2). Those from other underrepresented groups represented 24 percent of finalists and 9 percent of those elected (N=1). Both women and other minority nominees were strongly underrepresented among those elected. See Table 2.

4. Caucasian heterosexual men were elected in all diocesan/coadjutor elections during 2013-14 (N=8). No women and no men publicly identifying with an underrepresented group were elected in these processes.

5. Even a diverse slate of nominees does not result in election outcomes that represent the diversity of the Church and its ordained leaders. In the two dioceses where women were elected, women had represented 80 percent and 100 percent of the finalist nominees.

## **Discussion and conclusion**

Despite women having been elected as bishops for more than a quarter of a century, little progress has been made in diversifying the Church's Episcopal leadership over the past two decades. Other forms of diversity are lacking as well. The imbalance is even more critical when focusing on diocesan and coadjutor elections. In the eight such elections over this triennium, all electees were Caucasian heterosexual men.

Since both women and candidates representing other forms of diversity were finalist nominees to be voted upon in elections, in the same or greater percentage as their presence as initial candidates, this suggests that the discernment, search, and nomination processes are generally open to the diversity of the Church. The diversity gap between the finalist nominees and the election outcomes suggests that this period — from the

time that a list of finalists is made known until the time that a ballot elects a new bishop — is where further examination and analysis is most needed in order to discern what may account for these disparities.

Because each diocesan election process is autonomous, different conditions or factors may affect each election outcome. It is assumed that all finalist nominees represent candidates considered to be capable of effectively leading the diocese if elected. It also is assumed that elections select the candidate that delegates believe best represents the desired and needed leadership skills, regardless of gender, race, or other characteristics. Consequently, concern about the persistent pattern of lack of election of women and those from other underrepresented groups does not imply that those elected are not excellent leaders. Rather, it simply points to a broad pattern across the face of church leadership that suggests a breakdown may be occurring beyond the scope of coincidence.

In sum, the monitoring data shows that the sizable and persistent gender gap between those nominated and elected bishops suggest little sign of change. This also can be viewed as part of a broader diversity gap in episcopal leadership. The Task Force has sought support during this triennium to explore in more detail the basis of this gap so that effective recommendations could be made. However, without church commitment and support, monitoring of the current trends points to little if any change on the horizon in gender and in overall demographic diversity within the episcopate.

**Table 1. Gender and underrepresented minority candidate ratios by diocese**

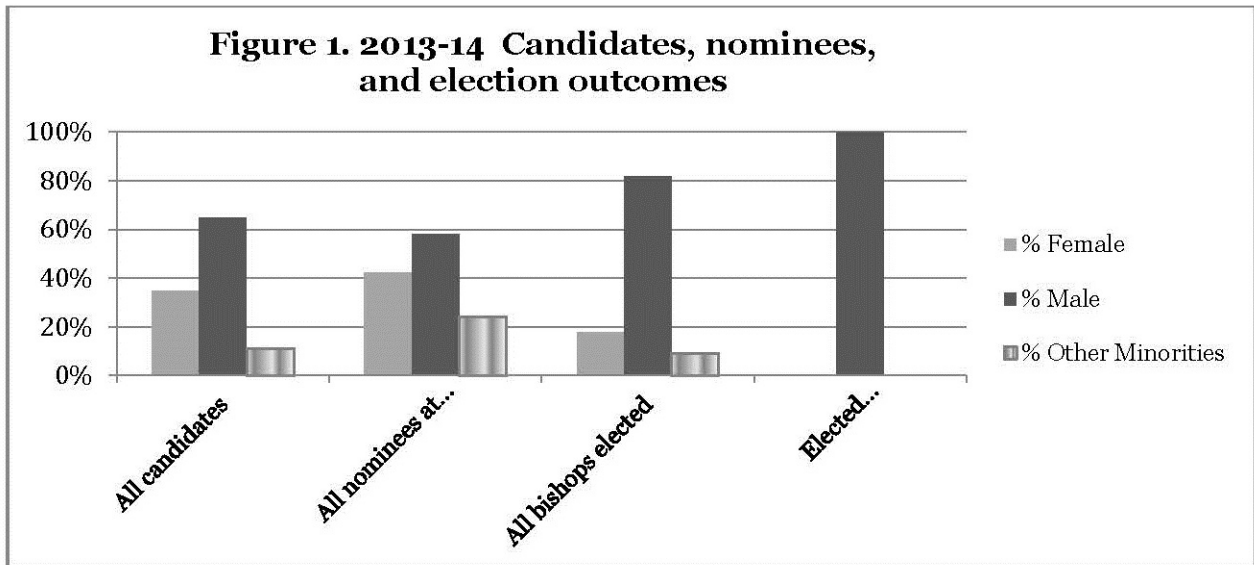
Election Process		Males	Females	% Female	Other Minorities <sup>1</sup>	% Other
2013	Fond du Lac	31	1	3%	0	0%
	N. Carolina–Suff.	33	16	33%	5	10%
	New Jersey	32	12	27%	6	14%
	New York–Suff.	19	22	54%	21	51%
	Southwest Virginia	35	8	19%	0	0%
	Western Michigan	69	42	38%	4	4%
	<b>Subtotal</b>	<b>33</b>	<b>33</b>	<b>50%</b>	<b>8</b>	<b>11%</b>
2013-14	<b>Total</b>	<b>252</b>	<b>134</b>	<b>35%</b>	<b>44</b>	<b>11%</b>

<sup>1</sup> Other minorities include only candidates publicly identifying as minority race, ethnicity, or sexual orientation. Some candidates may hold more than one minority status (race/ethnicity and sexual orientation).

**Table 2. 2013-14 Summary: Finalist Nominees and Election Outcomes**

Election Process	Males	Females	% Female	Other Minorities <sup>1</sup>	% Other
<b>Total Nominees at Election Time</b>	34	25	52%	14	24%
<b>Total Elected</b>	9	2	18%	1	9%
<b>Elected Diocesan/Coadjutor</b>	8	0	0%	0	0%

<sup>1</sup> Other minorities include only candidates publicly identifying as minority race, ethnicity, or sexual orientation. Some candidates may hold more than one minority status (race/ethnicity and sexual orientation).



**Table 3. Finalist Nominees and Election Outcomes by Year and Diocese**

Election Process	Males	Females	% Female	Other Minorities <sup>1</sup>	% Other
<b>2013</b>					
<b>Fond du Lac</b>					
Nominees at Election Time	3	0	0%	0	0%
Elected	1	0	0%	0	0%
<b>North Carolina-Suff.</b>					
Nominees at Election Time	1	4	80%	0	0%
Elected	0	1	100%	0	0%
<b>New Jersey</b>					
Nominees at Election Time	6	3	33%	5	56%
Elected	1	0	0%	0	0%
<b>New York-Suff.</b>					
Nominees at Election Time	2	3	60%	4	80%
Elected	1	0	0%	1	100%
<b>Southwest Virginia</b>					
Nominees at Election Time	3	2	40%	0	0%
Elected	1	0	0%	0	0%
<b>Western Michigan</b>					
Nominees at Election Time	2	2	50%	2	50%
Elected	1	0	0%	0	0%
<b>2013 total nominees at election time</b>	17	14	45%	11	36%
<b>2013 total elected</b>	5	1	17%	1	17%
<b>2013 elected Diocesan/Coadjutor</b>	4	0	0%	0	0%

<sup>1</sup> Other minorities include only candidates publicly identifying as minority race, ethnicity, or sexual orientation. Some candidates may hold more than one minority status (race/ethnicity and sexual orientation).

**Continued — Table 3. Finalist Nominees and Election Outcomes by Year and Diocese**

<b>Election Process</b>	<b>Males</b>	<b>Females</b>	<b>% Female</b>	<b>Other Minorities<sup>1</sup></b>	<b>% Other</b>
<b>2014</b>					
<b>Massachusetts</b>					
Nominees at Election Time	5	2	29%	2	29%
Elected	1	0	0%	0	0%
<b>Maryland–Suff.</b>					
Nominees at Election Time	0	4	100%	0	0%
Elected	0	1	100%	0	0%
<b>Massachusetts</b>					
Nominees at Election Time	3	2	40%	1	20%
Elected	1	0	0%	0	0%
<b>East Carolina</b>					
Nominees at Election Time	3	1	25%	0	0%
Elected	1	0	0%	0	0%
<b>West Texas</b>					
Nominees at Election Time	6	0	0%	0	0%
Elected	1	0	0%	0	0%
<b>2014 total nominees at election time</b>	17	9	35%	3	12%
<b>2014 total elected</b>	4	1	20%	0	0%
<b>2014 elected Diocesan/Coadjutor</b>	4	0	0%	0	0%

<sup>1</sup> Other minorities include only candidates publicly identifying as minority race, ethnicity, or sexual orientation. Some candidates may hold more than one minority status (race/ethnicity and sexual orientation).

# HOUSE OF BISHOPS THEOLOGY COMMITTEE

## Membership

The Rt. Rev. Joe G. Burnett, *Chair*  
The Rt. Rev. John C. Bauerschmidt  
The Rt. Rev. Larry Benfield  
The Rt. Rev. Tom Breidenthal  
The Rev. Dr. Sathianathan Clarke  
Dr. Stephen E. Fowl  
The Rev. Dr. A. Katherine Grieb  
Dr. Charles T. Mathewes  
Dr. Joy A. McDougall  
The Rt. Rev. Wayne Smith  
Dr. Kathryn Tanner  
The Rt. Rev. G. Porter Taylor  
The Rev. Dr. James Turrell  
The Rt. Rev. Michael Vono  
The Rt. Rev. Pierre Whalon  
Ms. Jackie Winter, *Staff*

### *Representation at General Convention*

Bishop Joe Burnett is authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To serve the House of Bishops as a theological resource, undertaking projects of theological inquiry as requested by the bishops. Occasional requests of the Committee are made by the General Convention and are addressed as it is possible for the Committee to do.

The Committee is composed of bishops and academic theologians who meet together once or twice a year, depending on available budgetary resources.

At the beginning of this triennium, the Committee was enriched by several new members appointed by the Presiding Bishop: Bishops Porter Taylor, Michael Vono, and Pierre Whalon, and consulting theologian James Turrell. We also gave thanks for the faithful service of retiring members, Bishops Robert Ihloff and Gayle Harris.

**Meetings:** During the triennium, the Committee met six times: Jan. 9-11, 2013 at the House of the Redeemer in New York City; Sept. 25-27, 2013 in Nashville, Tennessee; Jan. 29-31, 2014 at the Canterbury Center in Orlando, Florida; May 28-30, 2014 at the Bosque Center in Albuquerque, New Mexico; and Feb. 9-11, 2015 at the Transfiguration Spirituality Center in Cincinnati, Ohio.

At present the Committee is completing a major project that has engaged our attention and imagination throughout the triennium. The project emerged from a foundational conversation in January 2012 regarding a theology of discipleship and mission in the global economy.

As our Committee has explored these issues, we have examined recent literature on theology and economics, researched alternative economic practices of some intentional Christian communities, and reflected deeply on the missiological challenges of bridging cultural and economic divides.

As a result of these conversations, we have developed a three-part, in-depth study that is expected to be shared with the wider Church in the form of a digital interactive resource during Lent 2016. The major sections of the study, all of which will be available online, are as follows.

Section one will consist of a foundational theological essay on “The Economic Crisis and God’s Economy,” an analysis of some of the sources, causes, and consequences of our current economic situation. Section two will be an interactive, online, daily Lenten calendar highlighting the following themes in practical and theological perspective:

Ash Wednesday to Lent 1 — Abundance and Challenge

Lent 1 — Income Inequality and the Common Good

Lent 2 — Consumerism and Consumption

Lent 3 — Underemployment and a Living Wage

Lent 4 — Faithfulness in a Global Economy

Lent 5 — Environmental Degradation

Holy Week — Food and Shelter

Each of the days of Lent and Holy Week (Monday through Saturday) will offer easily accessible multi-media resources for reflection and prayer.

Section three will be an online library of print and video resources that highlight stories of Christian communities engaged in alternative economic practices or relationships. We see these as models that might inspire dioceses, parishes, and individuals to employ similar ministries in their missional contexts.

We are delighted to be receiving support and technical assistance in this effort from The Rev. Scott Gunn and Ms. Richelle Thompson of Forward Movement. Their expertise and experience have been vital in helping to shape the components of our work into a cohesive, digitally accessible format. As the season of Lent 2016 draws near, we expect to be publicizing and promoting this resource for use throughout The Episcopal Church and beyond.

One item for the Committee’s potential future work and study is a renewed engagement with the theology of the eucharist. We would expect, among other things, to explore what it means to understand eucharistic assembly and celebration as a quintessential activity of the people of God in mission and ministry.

The Committee continues to believe that the practice of theological study and reflection is essential to the life of the Body of Christ, and is grateful for the opportunity to contribute to this endeavor.

# HOUSE OF DEPUTIES COMMITTEE ON THE STATE OF THE CHURCH

## Membership

The Rev. Andrew Green, *Chair*, 2015  
Mr. Alfred D. Price, *Vice Chair*, 2015  
The Very Rev. Earle King, Jr., *Secretary*, 2015  
The Rev. Deacon Richard Cole, 2015  
The Rev. Jason Emerson, 2015  
The Very Rev. Dr. Neal Michell, *Resigned*, 2015  
The Rev. Karen Montagno, 2015  
The Rev. Canon Emily Morales, *Resigned*, 2015  
The Rev. Bonnie Perry, *Resigned*, 2015  
Ms. Victoria Prescott, Esq., 2015  
Mr. Scott Remington, Esq., 2015  
Ms. Nina Vest Salmon, 2015  
Mr. Michael Sells, 2015  
The Rev. Rob Skirving, *Resigned*, 2015  
The Rev. Kammy Young, 2015  
The Rev. Gay Clark Jennings, *Ex Officio*, 2015  
The Rev. Canon Dr. Michael Barlowe, *Staff*  
Dr. Kirk Hadaway, *Staff*

### *Changes in Membership*

The following changes in the membership of the Commission took place during the course of the triennium. Deputy Michell resigned from the Committee; Deputy Green replaced him as Chair. Deputy King replaced Deputy Green as Secretary. Additional resignations from the Committee included Deputies Morales, Perry, and Skirving. No new appointments to the Committee were made.

### *Representation at General Convention*

The Rev. Earle King, Secretary, is authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To prepare and present a report on the state of The Episcopal Church [Canon 1.6.5b.] and to set the form of the Parochial Report.

**Meetings:** Following the 77th General Convention, the Committee met eight times via web-based video conference call (Adobe Connect). Its only face-to-face meeting was in September of 2014 to draft the final report.

The annual Parochial Report, which is to be completed by all congregations, is the primary data source for this report. Dr. Kirk Hadaway, from the Office of Congregational Research for The Episcopal Church, provided generous and expert assistance, which included an analysis of the Parochial Report data. In addition, the Committee drew upon results of the “Episcopal Overview: Findings from the 2014 Survey of Episcopal Congregations” (as well as from prior editions) — a 10 percent true sampling across the Church, conducted by Dr. Hadaway. Dr. Hadaway was present for all Committee meetings. The Committee expresses its thanks to Dr. Hadaway and all those who participated in our data-gathering process.

The Congregational View Subcommittee utilized the Parochial Report data, summarizing trends and identifying some of the alternative ways of assessing congregational life, and gathering and reviewing the metrics currently used to capture the state of our faith communities. In addition, the Subcommittee examined data from “Episcopal Overview: Findings from the 2014 Survey of Episcopal Congregations” and from “FACTS on Episcopal Church Growth.” A summary of significant trends in these findings for the years 2005, 2008, 2010, and 2014 is available below. An additional resource was Dr. Matthew Price of the Church Pension Group.

The Regional View Subcommittee, which looked at dioceses and provinces, gathered data from a number of sources. For the analysis of life at the provincial level, the primary data were from the minutes of the December 5, 2013, meeting of the Provincial Leadership Conference in Newark, New Jersey, along with the reports from each province at that conference.

The Regional View Subcommittee developed two surveys. All executive assistants of diocesan bishops were invited to complete a wide-ranging online survey. A second survey was sent to the provisional or diocesan bishops; to Standing Committee members of the dioceses of Fort Worth, Pittsburgh, San Joaquin, and South Carolina; and to the former provisional bishop and Standing Committee members of the Diocese of Quincy (which merged with the Diocese of Chicago).

The Subcommittee also interviewed the deans of seven Episcopal Church seminaries.

The Churchwide View Subcommittee interviewed members of the church-wide staff at the Church Center, including the Presiding Bishop, the Chief Operating Officer, the Executive Officer of General Convention, the Director of Human Resources, an Officer for Global Relations and Networking, and an Associate for Mission Development. Other interviews by phone or by Adobe Connect included the President of the House of Deputies, the Treasurer, and the Chief Financial Officer. While in New York City, the Subcommittee also visited the office of the Church Pension Group and interviewed the President of the Church Pension Group as well as the Vice President for Research and Data. Those interviewed represented a wide range of experience — eight months to 25 years — with governance in The Episcopal Church.

The Subcommittee also interviewed representatives of 15 dioceses as to their perspectives on The Episcopal Church as a whole, and in particular on the Church Center and the church-wide staff. Those interviews typically included the diocesan bishop, along with one other person in the diocese who had significant interaction with the church-wide staff. Dioceses were selected to offer a broad representation of The Episcopal Church, not only geographically but also from the standpoint of size and financial resources: Bethlehem, Chicago/Quincy, the Convocation of Churches in Europe, Connecticut, Haiti, Minnesota, Mississippi, Northwestern Pennsylvania, Oregon, Pittsburgh, Rio Grande, San Diego, Upper South Carolina, Virginia, and Western New York.

## **Introduction**

The Committee on the State of the Church observes that The Episcopal Church is already a new Church in many ways — some ways are challenging, and some bring joy. We are, above all, a Church that is filled with hope. As our Committee discussion and reflection progressed over the course of the triennium, we recognized change as the predominant reality of the state of The Episcopal Church. We have changed, are changing, and will continue to change.

We’re different. We’re smaller. We’re less well-to-do. We’re older. Our clergy are deployed differently and do ministry through roles that are changing. Our laity are leading in mission and congregational life. We’re connected in new ways to partner in Mission nearby and far away. We’re learning new ways to look at ourselves and new pathways to sustainability.



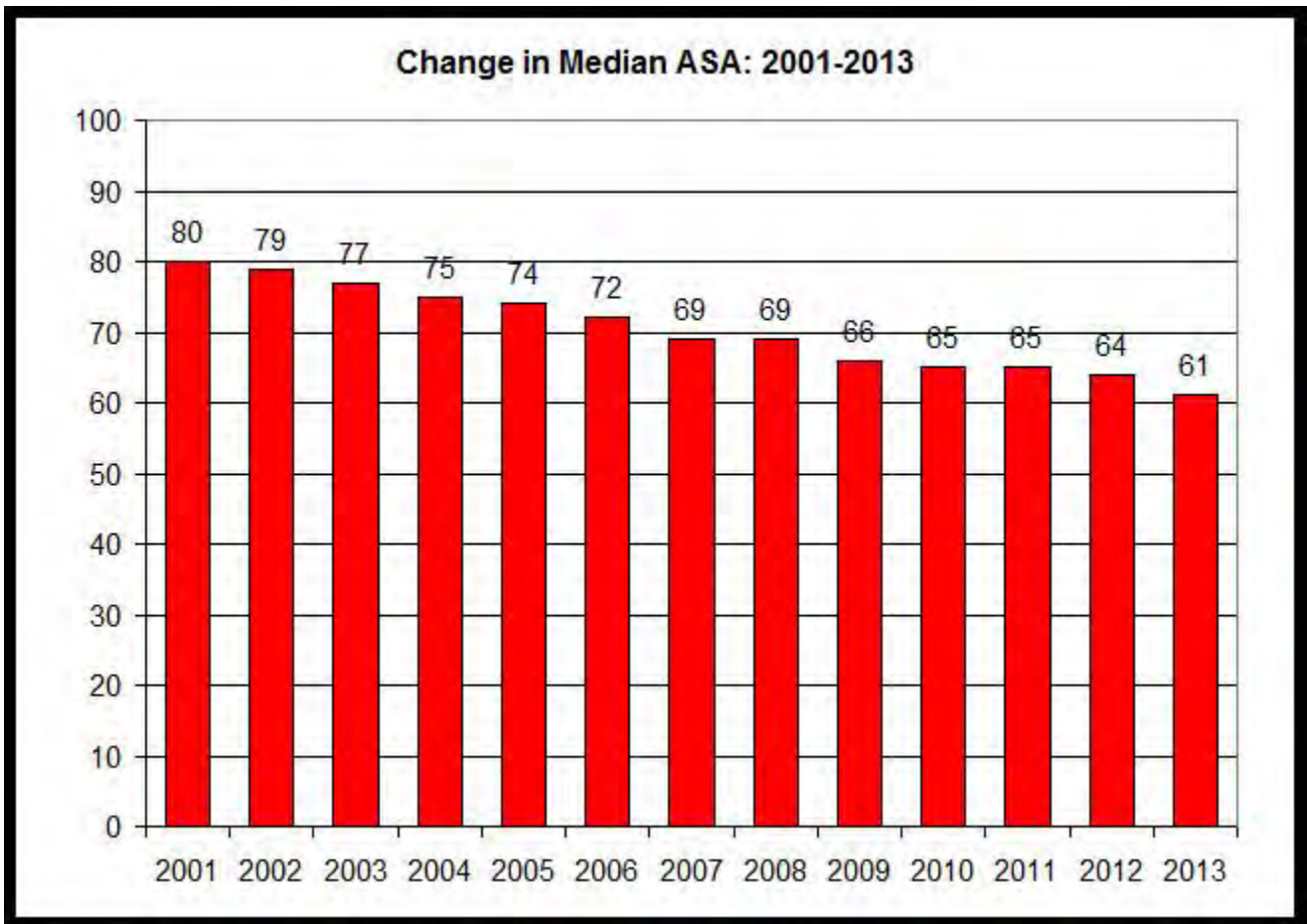
We’ve been tested, and we are being tested. Perhaps, because of this and by the grace of God, we are being made stronger for the Mission ahead of us. As the Catechism reads: “The mission of the Church is to restore all people to unity with God and each other in Christ.” In the scope of this report, Mission will refer to the definition from the catechism unless otherwise defined in context.

As a new and renewing church, The Episcopal Church celebrates the joys and challenges of a global community called to mission filled with hope.

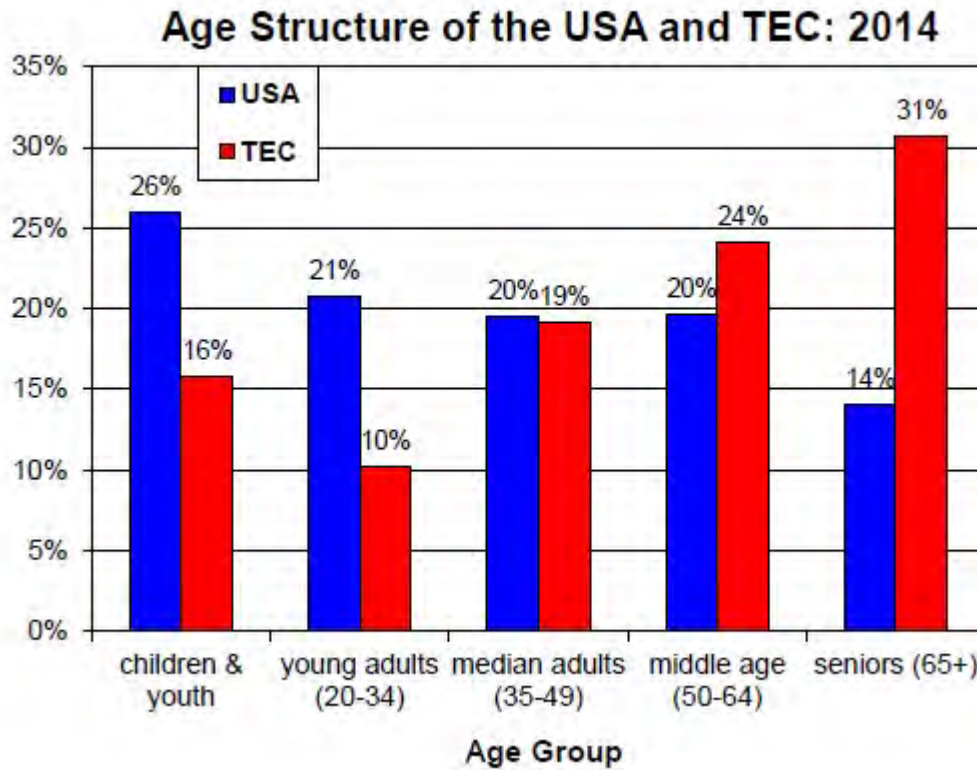
The balance of the narrative report is in three sections. The first looks at the Church from a congregational perspective, the second from a provincial and diocesan perspective, and the third from a church-wide perspective. This is followed by additional tables and resolutions.

**Part I: A Changed and Changing Picture of Congregations, and Implications**

Amid growing concern about the state of the Church in turbulent times, there are signs of growing Mission, transformation, resiliency, and the presence of the ever-creative and renewing work of the Spirit. Demonstrably, congregations have changed, are changing, and will continue to change. The median Average Sunday Attendance (ASA) has dropped from 80 to 61 in the last 13 years (see the table below). This means that on any given Sunday, 50 percent of congregations have 61 or fewer people in the pews. We are a denomination of small congregations, the consequences of which ripple through all areas of the state of the Church.



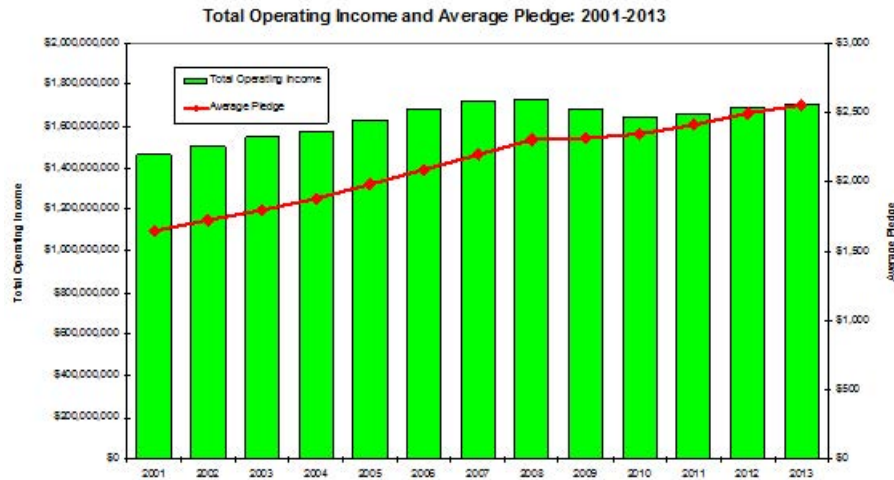
Furthermore, congregations in our Church are, on average, older and whiter than the population of the United States. The 2010 US Census reported 72 percent of the population as non-Hispanic white, while in 2009 The Episcopal Church reported 87 percent as white. As the table below illustrates, our age demographics are quite different from those of the United States.



Related to the size of our congregations, the model of a full-time, paid, seminary-educated priest as the rector of a congregation is no longer predominant. While 100 percent of congregations with 226+ members have at least one full-time paid cleric, and 96 percent of congregations with 126-225 members have at least one full-time paid cleric, these numbers only represent a small portion of the total congregations. Of the 6,622 domestic congregations in The Episcopal Church, 45 percent do not have a full-time paid priest.

The amount of conflict, and the source of conflict in congregations, has changed. There is a downward trend in the percentage of congregations who report experiencing at least some conflict in the last five years. In 2005, 93 percent reported conflict; in 2008, 90 percent; 2010, 89 percent; and in 2014, 77 percent. Money has replaced issues of sexuality as the most commonly reported topic of conflict.

Giving patterns in the Church have also changed. While there are fewer people, they are giving more. There is no way to determine if increased giving is from a growing sense of stewardship or from trying to make up for declining numbers. As the chart below shows, however, the combined operating income of congregations is recovering to pre-2008-recession levels. While there is no data on the median income of Episcopalians, the average pledge would appear to be woefully below the biblical tithe. (See table below.)



The preceding statistics illustrate what has already changed, but some changes are ongoing. Dioceses are restructuring, offering congregations new opportunities. Some cases of diocesan restructuring are formal, such as the reorganized dioceses of Fort Worth and San Joaquin. Other dioceses, such as Minnesota and Nebraska, are voluntarily reorganizing their operations in order that they might better serve congregations. Regardless of the impetus, congregations are consequently given new opportunities and new support to carry out their local ministries.

Another area of continuing change is growing deployment of women as rectors or vicars. The number of congregations reporting having a female rector or vicar rose from 24 percent in 2005 to 30 percent in 2008, and then to 36 percent in 2014.

What constitutes a worshipping community is an emerging and changing definition. Anecdotal reports of various Episcopal communities, such as those gathering for worship in laundromats and to do laundry for those with low incomes to gatherings in bars for hymn sings, are indicative of developing models. Consequently, how we count congregations and measure the vitality of congregations is changing. At one time, the Parochial Report asked only for baptized membership. Now it asks for Average Sunday Attendance, and some even argue that it over-emphasizes ASA. There will be more discussion below on the Parochial Report and on attempts to assess congregational vitality.

The theological culture of congregations continues to change as well. Trends show that the number of congregations reporting themselves as theologically “in the middle” has increased since 2005. Those who identified as very conservative have decreased since 2005. Those reporting as somewhat liberal or very liberal have remained approximately the same.

**Implications**

We can foresee some changes. The changing nature of clergy deployment will likely require changes in how pension and benefits are administered by the Church Pension Group under the direction of General Convention. Similarly, the model of “solo ministry” will likely change to more partner-based forms, such as increased roles for laity, and/or more clergy couples serving the same call. Also, more collaboration is likely, especially in the form of mission hubs. The interviews of diocesan staff by the Churchwide Subcommittee revealed significant energy around the new ways Mission is engaged locally by emerging partner relationships with surrounding worship communities.

## Measuring Viability vs. Assessing Congregational Vitality

While the standard Parochial Report metrics may be acceptable traditional measures of congregational life, we observed that they do not capture the dynamics of a changing church. Traditional indicators are clearly associated with the potential for congregational growth and long-term viability because they track numeric growth or decline. Such indicators, however, are less reliable as predictors of spiritual growth and development. They may tell us very little about new ways of being communities of faith. The Parochial Report does not collect data on new forms of worship, non-Sunday service times, non-church building sites of worship, and other factors that impact the spreading of the Gospel.

The term “viability” should be properly understood to denote financial stability and long-term sustainability as measured by regular attendance, fiscal integrity, leverage of physical property, and effectiveness of parish administration. Traditional Parochial Report statistics that track patterns of worship, financial support, Christian education, and outreach help us to know if congregations are “viable.” For example, the Diocese of Massachusetts has developed a system to assess congregational viability of all its member congregations on a regular basis. Their system allows diocesan staff to utilize an early-warning system to identify congregations that may be entering a period of distress, so that in concert with congregational leadership, appropriate intervention strategies may be developed.

In contrast, the term “vitality” connotes passion, vibrancy, and a lively response to the dynamic challenges and opportunities of God’s Mission in the local and global world. “Growth” of any congregation is undoubtedly associated with both viability and vitality, but no doubt that what The Episcopal Church should be interested in measuring and assessing is congregational well-being: are our congregations healthy, vigorous, sustainable, robust, thriving, and flourishing?

Congregational size or affluence is not always an indicator of congregational integrity, resilience, well-being, or vitality. Dr. Matthew Price, Vice President for Research and Data for the Church Pension Group, analyzed a link between seat usage in a congregation and vitality. For example, a congregation that has 200 people attending over four services a weekend in a building that seats 500 is likely less vibrant and vital than is a congregation with ASA of 100 with one service a weekend that seats 150. Looking at dioceses this way, Price found that seat utilization is highest in the Southeastern United States. Furthermore, the same region is the only one to experience growth in seat utilization between 1991 and 2011. There are a variety of phenomena, both internal and external, that could describe the cause of this trend. However, and more importantly, more research needs to be done utilizing narrative data to test the hypothesis that congregations and dioceses with higher levels of seat utilization are more vibrant, alive, and thriving.

Many communities of faith, both congregations and dioceses, have begun to understand the importance of vitality as well as viability to our life together. Some dioceses, such as Newark, have begun to address measures of vitality through vision or covenant documents, narrative, sharing of stories, or development of assessment tools. Newark is not the only diocese to add a “Page 5” to supplement the metrics gathered by the four-page standard Parochial Report. This “fifth page” is devised to glean additional information, a way of assessing vital signs within congregations. (We also note, however, that in other cases, a diocesan “Page 5” simply asks for further financial detail.)

A statement by the Diocese of Olympia demonstrates this trend:

“We believe that developing healthy congregations is central to our call. To that end, we have a clear strategy and ethos of development and health in all our congregations, no matter what the size or context. We assist congregations in facilitating clear expectations and in developing leaders — lay and clergy — who are given the skills and have the understanding to take responsibility for development. We believe that congregational development means far more than numerical growth, but when development is done well, numerical growth is often an outcome.”

See <http://www.ecww.org/congregational-development-building-strong-and-healthy-communities-faith>

Many dioceses and congregations are stretching beyond funding and measuring maintenance to funding and measuring mission. An example is the Diocese of Chicago's Vitality Grants: <http://www.episcopalchicago.org/our-tools/congregations-commission/>

At the church-wide level, this past triennium the Executive Council approved and made available funding to support "Mission Enterprise Zones," through which a wide variety of experimental local ministries could receive seed grants and startup funds. All of this points to an increased and increasing emphasis on assessing congregational vitality.

### **Toward An Index of Congregational Vitality**

The Committee on the State of the Church invites the wider Church to ask itself some challenging questions about the basic content of the Parochial Report:

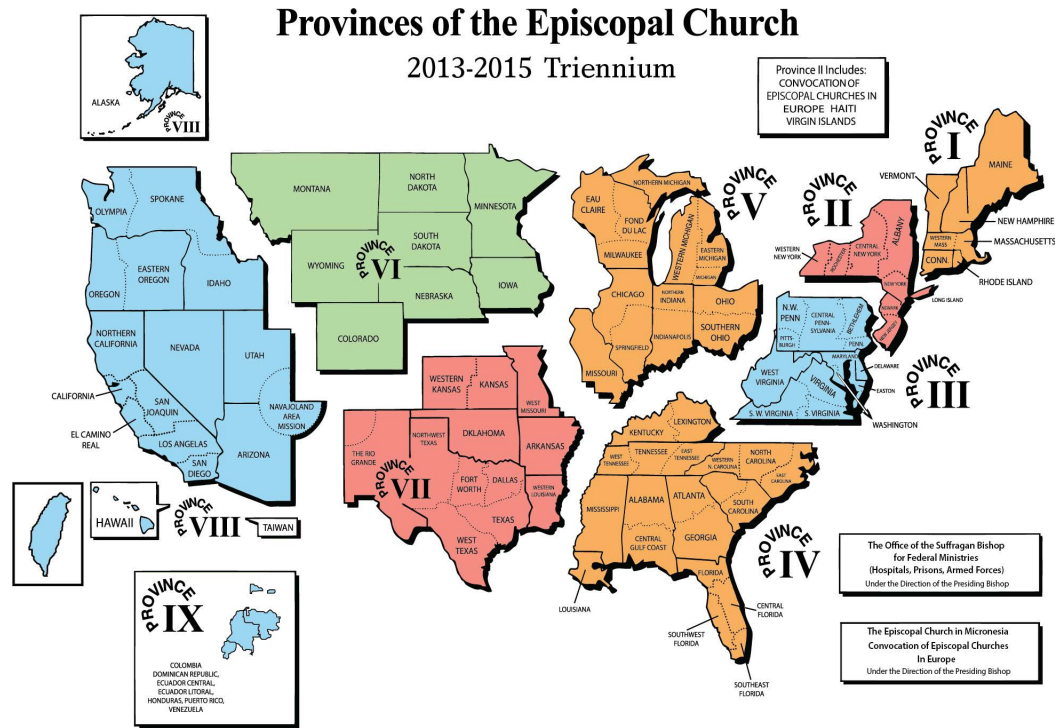
- (1) What if we have been looking at the phenomenology of church life using inadequate and/or inaccurate measures?
- (2) How might our self-study be improved if we engaged a team of social scientists and religious experts, and developed a vitality index of our own, to use alongside the metrics presently captured in the Parochial Report?
- (3) Is it possible that some of the most important activities in which we are engaged — evangelism, tending to the spiritual needs of our own members, and addressing the basic human needs as well as the emotional and spiritual needs of our neighbors — can only be understood properly when we re-think the facts that we gather?

The Episcopal Church at the congregational level is at a crossroads. Especially encouraging is the decrease in congregations that report being in conflict. There are metrics that suggest that the sharp declines of the last decade are abating; and these are, indeed, signs of hope.

### **Part II: A Changed and Changing Picture of Provinces and Dioceses**

Since the 2012 General Convention, much has changed at the level of provinces within The Episcopal Church, and the Committee on the State of the Church made a special effort to investigate these changes.

The provincial component of our Church's governance system dates back over 150 years. Because provinces are a creation of General Convention, their powers (such as they are) are derived from General Convention and not necessarily the dioceses of which they are comprised. Under this authority, provinces meet in regular synods to conduct the business of the collection of dioceses in a particular geographic region of the Church and to act as a conduit between individual dioceses and the wider Church. Throughout the 20th century, provinces have formed, morphed, and grown to accommodate the needs of the Church.



When in 2012 The Episcopal Church embarked upon an effort at reimagining itself, the Provincial Leadership Conference (PLC) also decided to review its purpose, scope, and role in future governance. During the most recent PLC, six of the nine provinces noted that they were engaged in some manner of re-evaluation of their purpose and/or role. Since the provincial structure is in place and familiar to the Church at large, some have noted that provinces might have the potential to reduce some of the burdens of General Convention if they were granted more legislative authority, or if provincial synods were utilized as a platform to debate relevant issues prior to General Convention.

Provinces, some suggest, may more effectively replace personnel and resources lost at the church-wide level as a result of budget reductions. The 2012 report from the House of Deputies Committee on the State of the Church noted that representatives from the Standing Commission on the Structure of the Church, the Executive Council, and the PLC have had conversations toward this end. During the most recent triennium, the Executive Council continued to encourage the PLC to share administrative responsibilities in an effort to conserve resources.

While each of the provinces provides a platform for collaboration, provinces appear to fall into one of two categories when describing their purpose. The first group consists of provinces (I, II, IV, VIII & IX) that see their existence and ministry as separate and distinct from the ministry of an individual diocese. The second group's provinces (III, V, & VI) view their primary purpose as facilitating diocesan collaboration and sharing of resources, assets, and experience. These classifications are not absolute; however, in a world of declining resources, the work of the provinces seems to be shifting more toward the second broad group, with provinces embracing opportunities to consolidate resources and administration to support constituent dioceses. Those provinces with unique ministries are dealing with reduced funding by narrowing their focus in an effort to do fewer things better. For instance, Province II recently decided on a strategy to focus its energy into five areas: Haiti, Stewardship, Spotighting Success, Youth, and Mission Activities. All of the provinces report that they are looking at ways to better utilize the Five Marks of Mission in their respective operations.

With the uncertainty surrounding what the Task Force for Reimagining the Episcopal Church (TREC) may recommend, some provinces are hesitant to enact sweeping reforms to the manner in which they operate.

Nevertheless, diminishing financial resources create an impetus for change. In Province V, there is a concerted effort underway to make the Province more relational and collaborative, as opposed to being seen as simply another link in the Church's governance chain. Province V recently adopted a purpose statement:

“The primary purpose of the Provincial system is to facilitate dioceses' ability to collaborate together in ministry, whether it be in common projects or through the sharing of resources, assets, and experience.”

This shift from “first-party ministry” to “ministry support” is evident in other provinces as well. A trend may be emerging whereby provinces see themselves as a “network pool of resources” for their constituent dioceses. This is evident in the programming being conducted by the provinces.

The challenges cited by provincial leadership are not inconsistent with the challenges facing the Church at virtually every level. Based on the size of the provinces, communication and fellowship create challenges. Telephones and web-based systems aid in communication but not fellowship. Further, given the availability of resources and potential of the Internet, it is not surprising that the PLC senses a hunger in the provinces for “network pools” to offer support, resources, and educational materials, even though the PLC does not appear to have a web presence for the resources it produces. Nevertheless, provincial synods and in-person meetings afford the opportunity to connect and communicate on a personal level that cannot be matched by virtual meetings. Face-to-face meetings create opportunities to break down isolation and to reflect on what unites us in the Church.

The two most commonly cited priorities for provinces are youth engagement (IV, VI, VIII, & IX) and outreach (VIII, IV, II, & I). While in many respects outreach depends upon financial resources, increasing youth engagement remains a constant struggle in the Church. Perhaps one of the greatest opportunities the provinces have is to consolidate and share resources to find the right programming to make an impact on young people’s involvement in the Church.

### **Leadership within Dioceses**

The Committee considered the dynamic nature of dioceses through the lens of finances, clergy, and lay leadership.

### **Financial**

Mirroring the wider economy, church financial pictures are improving. Dioceses operate on funds collected from congregations, endowments, interest income, grants, rents and leases, donations and bequests, and camp and conference fees. Dioceses most commonly respond to budget challenges in the predictable ways of eliminating or reducing personnel, programs, publications, and the diocesan asking from General Convention. However, July 2014 financial reports indicate that 99 percent of all dioceses are giving to the General Convention budget, with about half at the requested 19 percent of budget asking. See Appendix 4 for data on income and expenses for Episcopal congregations by province and diocese, and Appendix 5 for data on diocesan commitments and payments.

Shared resources such as buildings, clergy, financial and administrative personnel, communications and media support services, and training resources are another way dioceses protect financial resources. “Personnel” ranks as the top category for budget allocation in a 2014 church-wide survey. “Ministries: Programs that primarily serve members of the church” ranks second; Giving to the Domestic and Foreign Missionary Society (the corporate name of The Episcopal Church) ranks third; Administrative, fourth. More

than two-thirds of respondents rank “Ministries: Outreach” below personnel expenses and programs serving church members.

### **Clergy Leadership — Bishops**

The role of bishop at one time represented a commitment to a particular diocese or jurisdiction from the time of election until retirement and the end of active ministry. In the 2014 church-wide survey, about a sixth of respondents reported bishops who had moved into other dioceses or roles in The Episcopal Church. Bishops may leave service at a “normal” retirement age or take advantage of the rule allowing full retirement at age 55 with 30 years of service (30/55). Some bishops who retire under either circumstance may continue to minister in other roles, such as assisting or provisional bishops. There is little evidence of any increase in bishops’ resigning their position, before retirement, in order to serve in another position.

### **Clergy Leadership — Priests**

The profile of what is typical for clergy leadership has changed. While most churches say they want a full-time priest, the reality reflects something different. Church-wide shifts to part-time, semi-retired, short- and long-term supply, or bi-vocational ministry are increasingly common. According to the 2013 Parochial Report, 45 percent of domestic parishes and missions are served by clergy who are not full-time.

All survey respondents report utilization of the Priest-in-Charge method of clergy placement. In this process, the diocesan bishop suggests a limited number of candidates, and the Priest-in-Charge selected may have the possibility of becoming the Rector. The speed of this process, the lack of a church-wide search, and the possibility of the Priest-in-Charge being a probationary candidate for Rector represent a change in the process for selection of a new rector. Of the respondents, 65 percent report that bishops “sometimes” utilize placement of a priest-in-charge rather than a traditional search process conducted by the parish. Seventeen percent indicate this model is used “often”; an additional 17 percent say it is used “more and more.”

### **Lay Leadership**

One of the new ways dioceses are addressing leadership needs is through increased roles for laity. This includes shared leadership models in which laity have a prominent role, as congregations are yoked or use bi-vocational clergy. Several dioceses have instituted enhanced training for lay leaders. The availability and expense of full-time clergy is a factor in the increased use of bi-vocational clergy, supply clergy, and yoked congregations. This has also increased responsibility on laity to govern and to handle pastoral concerns, mission, and outreach. Many dioceses are exploring the licensed ministries of laity such as Pastoral Leaders, Worship Leaders, Preachers, and Catechists included in Title III Canon 4 Sections 3-8.

### **Clergy Leadership Formation/Seminaries**

During the past six decades, the average age of seminarians in The Episcopal Church has risen considerably. During that same period, the rate of Episcopal seminary attendance has declined. Factors such as distance, time, cost, and the availability of other options afforded by alternate formation through diocesan initiatives are often cited as reasons for this general trend toward non-Episcopal seminary attendance. The influence of diocesan leadership is notable in the determination of seminary attendance of postulants for ordination to the priesthood in The Episcopal Church, as reflected in some regional trends.

Research also indicates that large educational debt is not uncommon for seminary graduates, and financial pressures caused by these debt levels severely limit the ability of seminary graduates to accept calls to Christian ministry, and undermine the effectiveness of too many pastoral leaders. The fact that graduates of Episcopal seminaries are more likely to be currently employed, and the fact that these graduates generally



earn higher salaries, is a pattern for consideration, along with others that underscore the importance of support for Episcopal educational institutions for the stability of The Episcopal Church and the financial health of future clergy.

The deans of seven Episcopal seminaries were interviewed regarding clergy formation: Justin Terry, Trinity Episcopal School for Ministry; Roger Ferlo, Bexley Seabury; Ed Salmon, Nashotah House Theological Seminary; Kurt Dunkle, General Seminary; Joe Britton, Berkley Divinity School; Neil Alexander, The School of Theology, Sewanee; and Mark Richardson, Church Divinity School of the Pacific. Their interviews are available at: <http://youtu.be/pX5xQdoW1OA>

In spite of the air of crisis that has beset theological education during the past five to six years, there is new energy for the task of clergy formation. Almost every Episcopal seminary is under the leadership of a new dean. Funding and reorganization challenges are being addressed with renewed vigor and some success. We do not intend to minimize the challenges any of the Episcopal seminaries face, but the model of education is far from obsolete. There remains an enormous amount of energy and optimism across the breadth of the 10 seminaries of The Episcopal Church. Our seminaries are reconfiguring with positive motivation and momentum. Bexley Hall and Seabury-Western have formed a “federation” as they respond to both financial stress and creative collaboration.

Contentious relationships, unresolved as of this writing, at General Seminary, and possibly others, point to a heightened need for transparency and shared governance. It is a system with some challenges, but it is not in crisis. The challenges include changed relationships between faculty and Boards of Trustees. The stress on the system may heighten conflict.

It seems we may be moving toward a more “boutique” approach, with some of our seminaries addressing particular needs and focusing, for instance, on “low-residency” Master of Divinity programs and on “distributive” or online education. Other seminaries are emerging as “full-service” institutions holding up the notion that the residential model of priestly formation is paramount and viable.

The Lilly Endowment’s creation of the Theological School Initiative to Address Economic Issues Facing Future Ministers is currently addressing the issue of how financial pressures are limiting the ability of seminary graduates to accept calls to Christian ministry. The initiative’s aim is to encourage theological schools to examine and strengthen their financial and educational practices to improve the economic well-being of future pastors. Several of our Episcopal seminaries are recipients of these funds.

Collaboration, rather than competition, among the 10 seminaries of The Episcopal Church is an important focus for the future. There are conversations about holding inter-seminary “field meetings” on a three- to four- year cycle. These would be joint faculty meetings of each academic discipline in Episcopal theological education. Another initiative may be a common grant proposal for faculty development and to address the shortage of faculty candidates in some academic fields. The Episcopal Church seminaries’ academic deans are starting to meet regularly, both electronically and in person, for collaboration. There also has been some discussion of various ways of assessing the educational outcomes of those preparing for priesthood; and of seeking ways to evaluate that are increasingly thoughtful, fair, energizing, positive, and holistic.

As an alternative to residential seminaries, dioceses are exploring local options for those preparing for all kinds of ministry, including the priesthood and the diaconate. The Iona Initiative, which originated at the Diocese of Texas as the Iona School for Ministry, but which now is a collaboration of seven dioceses, is one example of how theological education is changing in terms of setting and purpose.

## Trends from Reorganized Dioceses

As deputies to General Convention are undoubtedly aware, recent years have witnessed conflict within the Church resulting in the efforts by some bishops and members of some congregations to disaffiliate from The Episcopal Church. There is clear evidence now that the days of bitterness caused by these rifts are mostly behind us. However, the current reality is that significant numbers of former members of these dioceses are gone. Remaining members of The Episcopal Church in those locales have actively reorganized themselves under new or provisional leadership.

- The Diocese of Pittsburgh elected a diocesan bishop, the Right Reverend Dorsey McConnell, in 2012.
- The Diocese of Quincy and the Diocese of Chicago, which had split in 1877, agreed to a reunion, which became effective in 2013.
- The Diocese of South Carolina, which reorganized in 2012, elected the Right Reverend Charles G. von Rosenberg as provisional bishop.
- The Diocese of Fort Worth, which reorganized in 2009, elected its third provisional bishop in 2012, the Right Reverend Rayford High.
- The Diocese of San Joaquin, which reorganized in 2008, elected its third provisional bishop in 2014, the Right Reverend David Rice. Although currently a provisional bishop, he may become a diocesan bishop.

The lack of continuity of leadership in some of the reorganizing dioceses has diverted time and energy from implementation of their long-range goals. These dioceses are rebuilding and have greater need for their bishop to be present and available on a full-time basis. The reorganized dioceses have primarily been served by the election of provisional bishops drawn from the pool of retired bishops. The current Church Pension Fund requirement that retired clergy (in this case, bishops) work no more than half time places significant limits on how a retired bishop is able to serve effectively as provisional bishop of a reorganizing diocese.

The loss of buildings and confusion of The Episcopal Church “brand” continue to be formidable problems for the reorganizing dioceses. Although buildings are not the Church, a building is important to the ongoing life of a congregation as a symbol and as an identifiable gathering place in our communities. Displaced parishes using “Sunday-only” rental space expend considerable time and energy setting up each Sunday, and some have had to relocate several times. Perhaps the most daunting aspect of this issue is the confusion caused when those who chose to leave The Episcopal Church nonetheless continue to refer to their churches and their dioceses as “Episcopal.” For communities worshipping outside their buildings, confusion over the rightful use of the Episcopal “brand” has made it difficult for the congregations within the reorganizing dioceses to attract new parishioners.

Despite this confusion, the reorganized dioceses may well be on the cutting edge of many practices that could become operational models or even larger trends within The Episcopal Church. For example, by necessity, congregations in the reorganizing dioceses continue to explore many new ways to “be church.” Borrowing worship space on Sundays has helped them excel in the art of “church in a box.” Some congregations have chosen to pool resources by yoking or combining, while others are discerning whether certain church properties should be repurposed. Creative partnerships have also been formed with the Evangelical Lutheran Church in America that include sharing space, holding joint services, and engaging in joint college ministry.

The reorganized dioceses have also increased their use of electronic communication. Robust websites and social media (Facebook, Twitter, Instagram) have proved invaluable ways to reconnect with faithful Episcopalians in dioceses who did not have access to official databases. Indeed, financial constraints have forced many congregations to use free communication tools available online.

## What Is Likely to Keep Changing at the Provincial and Diocesan Levels?

While none of us has a crystal ball allowing us to foresee the future, current information suggests strongly that selected trends can be projected into the near-term future.

- Collaboration — If nothing more, financial pressure alone may be sufficient to push dioceses toward greater functional integration, to pursue collaborative efforts in areas of work heretofore not considered. For example, most dioceses have “schools” that offer courses for persons who are in formation for one or another aspect of ministry. For many provinces, regions, and dioceses, inter-diocesan cooperative and collaborative efforts may well represent the most sensible approach to these activities in the Church’s near-term future.
- Vocational Formation — Specifically with regard to formation of ordained clergy, even while Episcopal seminaries are experimenting with new models of education for formation, parallel independent efforts are underway in certain places. The Kemper School, Iona, and the Anglican School of Theology-Brite, not to mention “Anglican Studies” tracks at universities such as Duke and Claremont, are raising up alternatives to the traditional model of the three-year residential MDiv program. Put another way, as the roles of clergy and lay leadership are changing – as the needs, resources, and human-capital capabilities of Episcopal congregations are changing – so will the ways and means of vocational preparation change.
- Communications — Many of the provinces of The Episcopal Church are large or are geographically non-contiguous. Below the level of the province, many of our dioceses encompass entire states. In Province I (for example, in Massachusetts or Connecticut) where geographic distances are not too great, the hardship or the “friction of distance” may not be too great to overcome. But in Colorado, or Wyoming, or Alaska, geographic distances may present significant impediments to frequent gatherings of the Church for common worship, discussion and sharing, and fellowship. In these circumstances, we can project greater reliance upon electronic means of communication. If that is accurate, it implies a need for ever greater attention to, and vigilance over, increasingly rapid changes in communications technologies; and to the need for hiring and retaining diocesan and provincial personnel who are skilled in ever-advancing communications technologies.

The Episcopal Church as a whole may need to address the most sensible articulation of the Church’s needs and opportunities at the provincial or diocesan level.

### Part III: A Changed and Changing Picture of The Episcopal Church as a Whole

In Part I, this report looked at the Parochial Report data as they describe congregational life. In the opening of Part III, this report will look at Parochial Report data as they relate to The Episcopal Church from a church-wide perspective.

It is sometimes difficult to see the good news when observable trends seem negative. The Committee on the State of the Church has worked to present a balanced view, presenting the numbers as they are and underlining points where the negative is turning in a positive direction.

In 2013, 94 percent of all Episcopal parishes and missions completed a Parochial Report. During the past four years, The Episcopal Church had a net loss of 166,664 baptized members, or -7.7 percent; 57,626 of these losses occurred in the most recent year for which data are available. Half of these losses were recorded by the Diocese of Honduras in Province IX (which revised its Parochial Report process in 2013), resulting in large-scale reporting adjustments in many parishes. Absolute membership losses were highest in Province IX, Province VIII, and Province II respectively; percentage losses were greatest in Province IX, Province V, and

Province VIII. Average Sunday attendance (ASA) statistics show a smaller net loss from 2009 to 2013 than for membership (-67,743), but a slightly higher percentage decline (-9.3 percent). All Episcopal provinces declined in ASA, with the most serious percentage declines recorded in Province IX, Province V, and Province VII.

The four-year trend (2009-2013) shows an 8 percent decrease in active membership and a 9 percent decline in average Sunday attendance. The 10-year trend data provides a longer view of what has occurred in the life of the domestic dioceses of The Episcopal Church. In that period, the Church has seen an 18 percent decrease in active membership and a 24 percent decrease in Average Sunday Attendance. Communicants in Good Standing also declined by 18 percent during the last 10 years. It should be noted, however, that the severity of annual declines began to moderate somewhat in 2011, with domestic losses dropping from around 50,000 members per year to less than 29,000 per year for three consecutive years (2011-2013).

Among Episcopal dioceses in the United States, membership dropped below two million in 2010, and is now 1,866,758; average congregational size dropped from 160 to 152; and the percentage of churches with Average Sunday Attendance of 100 or less increased from 67 percent to 69 percent. After income losses in 2009 and 2010 as a result of the recession, domestic congregations experienced growth in income in 2011, 2012, and 2013. Average pledges continued to rise, largely unabated by the recession.

"Domestic Fast Facts Trends: 2009-2013" in the table below provides a detailed snapshot of the past five years' statistics on membership and Average Sunday Attendance; of the percentage of churches that are growing and declining; net change year-to-year; the number of large and small congregations; and changes in patterns of giving.

**EPISCOPAL DOMESTIC FAST FACTS TRENDS: 2009-2013**

	2009	2010	2011	2012	2013
<b>Domestic Parishes and Missions</b>	<b>6,895</b>	<b>6,794</b>	<b>6,736</b>	<b>6,667</b>	<b>6,622</b>
<b>Active Baptized Members</b>	<b>2,006,343</b>	<b>1,951,907</b>	<b>1,923,046</b>	<b>1,894,181</b>	<b>1,866,758</b>
Net Change in Active Membership from Prior Year	-51,949	-54,436	-28,861	-28,865	-27,423
One Year % Change in Active Members	-2.5%	-2.7%	-1.5%	-1.5%	-1.4%
Five Year % Change in Active Members	-11%	-11%	-11%	-11%	-9%
Ten Year % Change in Active Members	-14%	-16%	-17%	-18%	-18%
% of Churches Growing 10%+ in Members (past 5 years)	25%	25%	24%	25%	25%
% of Churches Declining 10%+ in Members (past 5 years)	42%	42%	42%	41%	40%
<b>Total Average Sunday Worship Attendance (ASA)</b>	<b>682,963</b>	<b>657,831</b>	<b>657,887</b>	<b>640,142</b>	<b>623,691</b>
Net Change in ASA from Prior Year	-22,294	-25,132	+56	-17,745	-16,451
One Year % Change in ASA	-3.2%	-3.7%	+0.0%	-2.7%	-2.6%
Five Year % Change in ASA	-14%	-16%	-14%	-12%	-12%
Ten Year % Change in ASA	-19%	-23%	-23%	-24%	-24%
% of Churches with any Increase in ASA (from prior year)	35%	34%	43%	34%	33%
% of Churches with any loss in ASA (from prior year)	51%	54%	45%	53%	53%
% of Churches Growing 10%+ in ASA (past 5 years)	18%	17%	18%	20%	19%
% of Churches Declining 10%+ in ASA (past 5 years)	54%	57%	54%	51%	52%
<b>Percent of Congregations with 200 Members or Less</b>	<b>57%</b>	<b>58%</b>	<b>58%</b>	<b>58%</b>	<b>60%</b>
<b>Percent of Congregations with 500 Members or More</b>	<b>15%</b>	<b>15%</b>	<b>15%</b>	<b>15%</b>	<b>14%</b>
<b>Median Active Baptized Members</b>	<b>160</b>	<b>158</b>	<b>155</b>	<b>155</b>	<b>152</b>
<b>Percent of Congregations with ASA of 100 or less</b>	<b>67%</b>	<b>68%</b>	<b>68%</b>	<b>68%</b>	<b>69%</b>
<b>Percent of Congregations with ASA of 300 or more</b>	<b>5%</b>	<b>4%</b>	<b>5%</b>	<b>4%</b>	<b>4%</b>
<b>Median Average Sunday Worship Attendance</b>	<b>66</b>	<b>65</b>	<b>65</b>	<b>64</b>	<b>61</b>
<b>Average Pledge</b>	<b>\$2,314</b>	<b>\$2,346</b>	<b>\$2,410</b>	<b>\$2,491</b>	<b>\$2,553</b>
Plate & Pledge % Change from Prior Year	-2.8%	-1.2%	+1.1%	+1.2%	+0.8%
Normal Operating Income % Change from Prior Year	-2.8%	-2.3%	+1.4%	+1.4%	+1.2%
Inflation Rate in Calendar Year	+2.7%	+1.5%	+3.0%	+1.7%	+1.5%

Statistical measures by themselves do not tell the whole story. In the spring of 2010, under the direction and supervision of Dr. Kirk Hadaway of the Office of Congregational Research at the Episcopal Church Center,

1,100 surveys were mailed (with an online version available as well) to a stratified random sample of congregations in The Episcopal Church. 763 completed responses were filed, representing 11.5 percent of total domestic congregations. The response rate to the survey was 70 percent (adjusting for closed and merged congregations among the 1,100), which is sufficiently high to be representative of all congregations once the sample was weighted by size. Once again, as in 2008 and 2010, the most enlightening insight gained from that survey is the skewed age structure of The Episcopal Church.

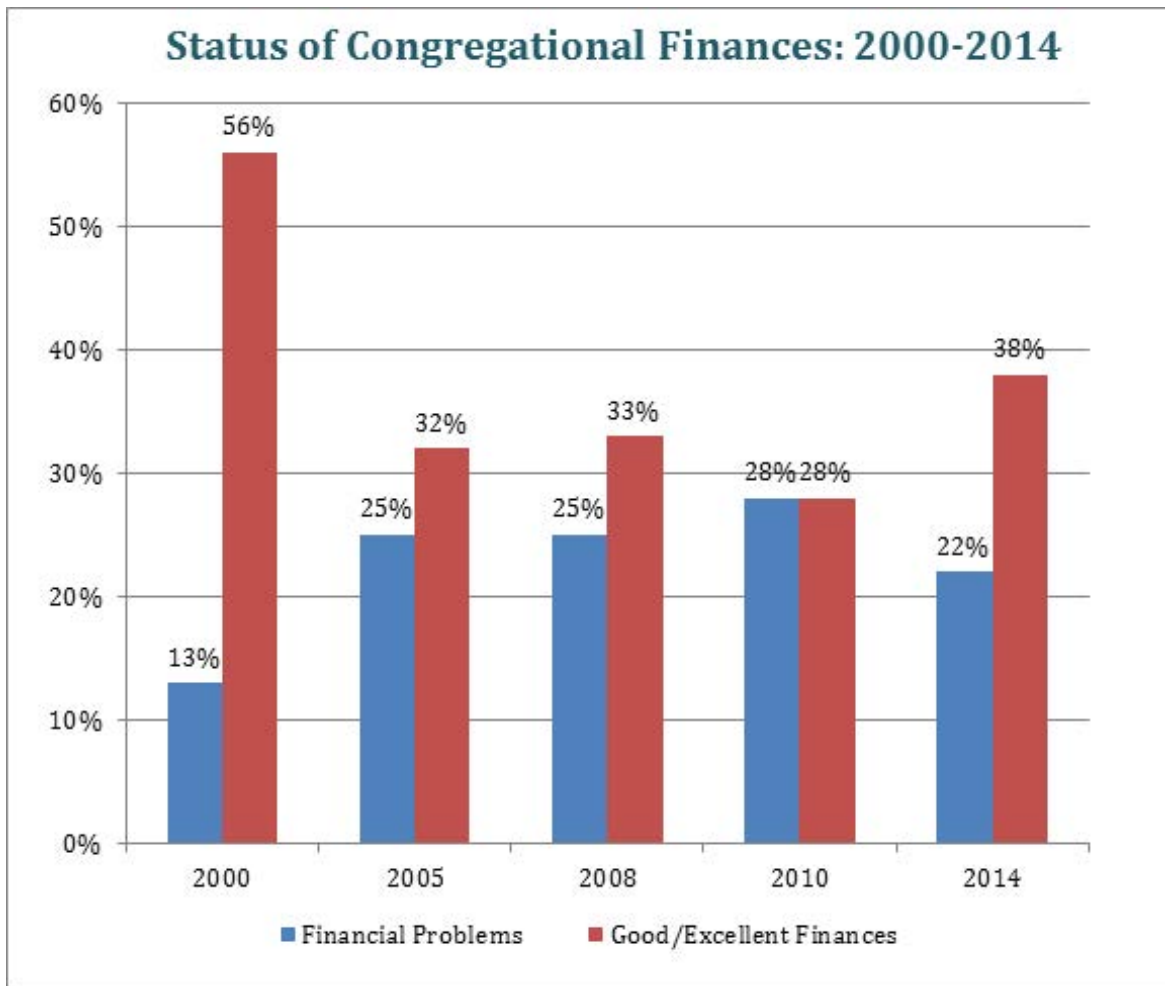
In addition to our demographic profile, the Summary Report of the *2014 Survey of Episcopal Congregations* gives reliable measurements on diverse aspects of church life, such as information on the kinds of programs congregations offer, styles of worship, efforts in outreach and evangelism, views of clergy and laity, and even data on sources of internal conflict and its consequences.

The advanced — and still advancing — age of the Church’s membership, combined with a low birth rate, means that the Church loses the equivalent of one diocese per year through deaths over births. Throughout the 1970s and 1980s, and even into the 1990s, the Church gained more adult members than it lost through persons changing denominations (particularly former Roman Catholics). In the fairly recent past, more people joined The Episcopal Church than left it, making up most, but not all, of the natural decline among participating adult members. That is no longer the case.

Despite these trends, around half of “cradle Episcopalians” are being retained. Detailed analysis of survey data also suggests that The Episcopal Church does make up for some of its losses through “transfers in,” although not nearly at the same rate as in the past.

Another noteworthy trend identified in the survey data involves the present financial condition of congregations. Recalling data presented above in the table, “Domestic Fast Facts Trends: 2009-2013,” normal operating income in 2013 showed a gain of 1.2 percent over the previous year. The five-year trend, however, showed a loss of 1.4 percent in total operating income. Increases in 2011, 2012, and 2013 moderated, but did not completely make up for the serious income declines in 2009 and 2010. With net losses in membership and attendance, the continuing financial burden falls more heavily upon remaining members.

Still, the rebounding economy has resulted in a change in the economic status of many Episcopal congregations. In 2014, 38 percent of Episcopal congregations, versus 28 percent in 2010, report that their financial condition is good or excellent. This proportion is below the 56 percent that reported good or excellent finances in 2000, but it does represent a change since the depths of the financial crisis. Not shown in Figure 6 below is the percentage of congregations reporting that their financial situation is “tight, but they get by.” In 2014, 40 percent of Episcopal congregations responded that they were in that situation. Thus, 62 percent of congregations are in some kind of financial stress in 2014, as compared to 72 percent in 2010, and only 44 percent in 2000.



A more detailed picture is presented when the financial stress data are arrayed by size of congregation. Financial stress is highly related to congregational size. Among two categories of small congregations, the proportion in financial stress is 74 percent among congregations with average worship attendance of 35 or less, and 68 percent among congregations with average worship attendance of 36 to 75. Larger congregations are less likely to be in financial stress. The proportion in stress is 58 percent among congregations size 76-125, 46 percent among congregations 126-225, 39 percent among congregations size 226-350, and only 24 percent among congregations with average attendance of more than 350.

When examining the fiscal outlook of The Episcopal Church (see tables at the end of this report), the reader will note that 99 percent of dioceses are contributing, with 50 percent giving at the current 19 percent asking. Increases have been approximately 0.5 percent per year since 2005, and are anticipated to continue at this rate. Two thirds of all The Episcopal Church’s budgeted income comes from dioceses. Another quarter comes from a draw from investments, which has had a net return of 7.7 percent during the past 10 years. The balance is from miscellaneous income.

The data above portray a Church that, in many cases, is shrinking, and yet in many cases is thriving. As this report maintains, measuring vitality can be demonstrated in ways other than by measuring people in the pews and dollars in the plates. Data from the interviews show vitality by other means.

## **Mission and Resourcing**

Episcopalians are people of Mission. Our interviews at every level of the Church revealed that this is true at the church-wide level no less than at the congregational and regional levels. The church-wide staff understand their mission primarily to be in the role of enabling dioceses and congregations to carry out their mission. They use the words “serve” and “diaconal” to describe their primary means of carrying out this mission – to provide support, resources, networking, information, and best practices to dioceses and congregations. One staff member described it as “customer service.”

Secondly, the church-wide staff understand that part of their mission is to oversee the tasks that generally dioceses and congregations are not able to do by themselves, such as deployment, ecumenical relations, and fostering relationships throughout the Anglican Communion. Those we interviewed in diocesan leadership positions generally agreed with these two primary missions. The church-wide staff are also involved in implementing policy and supporting leadership.

Generally, those interviewed in dioceses were quite upbeat about the assistance provided by the church-wide staff. However, there was some disagreement about what dioceses and congregations are “unable to do.” The assets available to the dioceses vary widely. Some dioceses are capable of providing for a large percentage of their needs, while other dioceses are less capable of making such provision. The latter are more likely to ask the Church Center to do those things that they are “unable to do.”

The church-wide staff have shifted away from specific program development to support of Mission through network building and by being a communication hub. In order to provide this support in a more robust way, church-wide staff have recently reintroduced the “liaison” system, whereby each diocese in the Church is connected to a specific person on the church-wide staff. Dispersal of some of the program staff across the Church is a further way to provide connections.

The perspective of many in dioceses has not always been encouraging. Some report that it was often extremely difficult to get specific assistance from the Church Center. Phone calls often did not reach the right desk; the website can be quite complex to navigate; and emails sometimes simply weren’t getting through to the right people. As a result, many have very low expectations of the church-wide staff.

For resourcing and networking, most acknowledge that the Church Center could be based almost anywhere. Some church-wide staff have said that as long as they had a place to work, they could be effective. Interestingly, even dispersed church-wide staff see the rightful location of the Church Center as in or near New York City. For example, some specific functions such as finance and Human Resources have a corporate need to be based close to New York. New York City is a more robust hub for Europe, Africa, and Latin America than is any other U.S. city. Ecumenical, international, and Anglican missions are high on the list of New York-based activities, although this could change as a result of the priorities expressed by General Convention. This past year, the total cost of operating the Church Center building at 815 Second Avenue was \$1.8 million. The annual income during the same period from tenants exceeded \$2.1 million. As the CFO writes, “815 Second Avenue is not an albatross.”

## **Reorganizing/Restructuring**

During the past decade, significant changes have been made in the organization, structuring, and deployment of the church-wide staff. First of all, there has been a significant reduction in the number of people on church-wide staff. In 2009 the Episcopal Church reported 185 employees; in 2014 it reported 154.

We heard repeatedly from the church-wide staff that reductions have had either no or very slight impact on the mission of the Church. However, there are pockets of low morale, which continue primarily in the wake of the massive staff cuts in 2009, and which build as each General Convention approaches. From a diocesan perspective, some respondents wish for a return of some of the “desks” that have disappeared at the Church Center.

The other change for the staff is its geographic dispersal. In 2014, 45 percent of employees are not primarily based at the Church Center in New York City.

In theory, dispersal helps put the church-wide staff in the field and in closer proximity to the local Church. Overall, almost everyone interviewed sees the dispersal of church-wide staff to be working effectively. The change in relationship between the dispersed staff officers and the resident associates has encouraged professional development and pride. As more staff are hired as dispersed, this model is likely to become the dominant expectation. Although the Presiding Bishop is not thought of as “dispersed,” as a practical matter she is out of the Church Center about 80 percent of the time in her role and ministry.

In the past decade, five dioceses have had to go through restructuring and reorganizing as a result of their bishop and many members of congregations disaffiliating with The Episcopal Church. Much support has been provided from the church-wide staff to help in reorganizing. In some important ways, this support process might be seen as a model for congregations and dioceses that are facing resourcing shortfalls. And, as many dioceses are considering ways of intervening when congregations are in crisis, learnings from this restructuring might be useful for The Episcopal Church to bring early hope to any diocese in crisis, irrespective of whether the crisis is a result of a potential schism or defection, or is simply the lack of adequate financial support.

The Episcopal Church is actively engaged with Province IX as dioceses aim to increase sustainability. Collaborations include specific efforts, such as Episcopal schools’ galvanizing ministries in local communities. Successful initiatives are well underway in the Dominican Republic and Honduras. Work in the other Province IX dioceses will follow in subsequent trienniums.

### **Clergy Trends Across The Episcopal Church**

The report of the Church Pension Fund will be found elsewhere in the Blue Book. The mission of the Fund, as found in the 2012 Blue Book (page 684), is this:

Our mission is to be the trusted provider of comprehensive, cost-effective retirement, health, and life insurance benefits to the Episcopal Church, its clergy and lay employees. Consistent with this central mission, the Church Pension Fund also serves the Episcopal Church through the development of other programs and services as approved from time to time by the General Convention and the Board of Trustees. The core values that guide CPF in fulfilling its mission are compassion, fiscal stewardship, mutual respect, service, and adaptability.

We commend to you the 2015 Report.

We note three of the matters that the Church Pension Fund has called to the Church’s attention. Currently, 45 percent of congregations in The Episcopal Church do not have full-time clergy. The average age of those ordained continues slowly to rise, currently at 48.0 (Church Pension Group 2014 annual report, page 11). Finally, the average age of all of those currently ordained is high, which means that there will be many retirements in the decade ahead. All three of these factors have significant consequences in calculating retirement income for clergy. As we look into the future, how will the Church help deal with financial concerns for clergy, especially if they are late arrivals into the ordained ministry and are carrying significant seminary debt?



Even without considering the Church Pension Fund and other compensation issues, the aging nature of our clergy and the emerging predominance of late-life ordination affects us church-wide in terms of loss of experienced senior clerical leadership — in congregations, in dioceses, in the church-wide arena, and in the episcopate.

### **Church-Wide Structures**

How the Church works together for Mission also includes examining the roles of Executive Council, CCABs, General Convention, etc. A number of people we interviewed spoke in particular of the tension between the House of Bishops and the House of Deputies.

Some whom we interviewed suggested that budget cuts have had a much greater impact on the House of Deputies than on the House of Bishops. Three of the obvious ways that the House of Deputies differs from the House of Bishops are 1) the House of Deputies meets only once every three years, while the House of Bishops meets semi-annually, 2) the House of Deputies is vastly larger than the House of Bishops, and 3) the turnover rate of members is much higher in the House of Deputies than in the House of Bishops. The combination of the three factors makes it much more difficult for those in the House of Deputies to forge relationships with each other and with the wider church than for those in the House of Bishops. If the duration of General Convention is reduced, the impact could be greater on the effectiveness of the House of Deputies than on the House of Bishops. As noted in the discussion above on provinces, face-to-face meetings create opportunities to break down isolation and to reflect on what unites us in the Church.

Between General Conventions, CCABs are one significant way in which the clergy and laity participate in advancing the Mission of the Church. They are an opportunity for Deputies and Bishops to interact about church-wide issues. Budget cuts in the last two trienniums have already changed the quality and frequency of Deputy and Bishop interactions. Budget cuts have already changed the ways that CCABs do their work – for example, meeting electronically rather than face-to-face.

### **Church-Wide View — How Might We Continue to Change?**

- Finances: As we have already reported, the average congregational pledge has increased consistently during the past decade. However, as Baby Boomers retire (and eventually die), congregational funding from plate and pledge is projected to fall. Younger people tend not to contribute at the level at which Boomers have contributed, and so will not make up the shortfall. This is always true of younger people, primarily because they have less money. The real problem is that there will be many fewer people in the generation that follows the Boomers. Another crunch on congregational budgets is the continuing rise in health costs for employees, along with pension assessments. This will be a challenge for the Church as a whole, as well as for the Church Pension Fund, to engage. The challenge will be further complicated by the increased number of part-time, non-stipendiary, and retired clergy who are serving as rector, vicar, or priest-in-charge.
- Communications: There has been a sea change in the way that people communicate. Twenty years ago, communication was almost exclusively by paper; today and into the future, it is electronic. Previously our communication was analog; now it is digital. Email has been superseded by Facebook, Twitter, Instagram, and other social media. Previously we have communicated with the expectation that the recipients of the communication would attend our Church. These expectations may not be realistic in the future. The Church at all levels will need to be alert to understand and use these new ways of communicating with those both inside and outside the Church.
- Measuring: The Parochial Report has been the traditional means by which The Episcopal Church has measured life in the Church. In the beginning of this report, we made extensive use of data provided

by the Parochial Report. We also noted that there have been calls from almost all corners of the Church to provide additional ways to measure vitality in the Church – factors besides just Average Sunday Attendance and NDBI. We believe that, in significant measure, this desire comes from congregations who are thriving and who are engaged in significant mission and outreach work. People want the Church to be aware of and to celebrate these ministries. The Church as a whole, along with this Committee (among others), will be grappling with this in the next decade. It is fairly easy to measure numbers (quantitative data). It's much more difficult to measure stories (qualitative data). At the diocesan level, the gathering of qualitative data can be extremely useful for assessment of congregations and their vitality. At the church-wide level, the means of gathering qualitative data, along with its use and analysis, is more complex. At this point, the Committee is not prepared to recommend to the Church any revised, specific means of measuring “congregational vitality.” However, the section of this report on “Change at the Parish Level” offers insight into what we have learned about assessing congregational vitality. That portion of this report offers specific suggestions for the work of this Committee for the next triennium.

## **Conclusion**

At the 77th General Convention in Indianapolis, the House of Deputies unanimously passed Resolution Cogs on Structural Reform. The President of the House then invited the House to respond to the resolution with a song. All the Deputies rose and sang “Sing A New Church Into Being.”

The House of Deputies Committee on the State of the Church has found that the change implied by this song is, to a greater or lesser extent, a reality for The Episcopal Church. We have experienced change, the changes are happening now, and we anticipate that this will be the reality for our future.

The numerical data continue to change. Decline in membership and attendance has slowed but not stopped. Losses from controversial decisions of General Convention have largely abated, and attention has focused on Mission and the structure of our administration and governance.

The demographic of our membership continues to change, and the gap between the makeup of The Episcopal Church and the population of the United States continues to increase. As a whole, we are getting older and are not as representative of the diversity of the communities in which we are based.

We have experienced change and growth in our Reorganized Dioceses. Each of them has moved forward and is inspiring the rest of the Church with new approaches to “being church.” They report that they have been slowed in their recovery by a lack of consistent episcopal resources to lead and care for them over time. Although one diocese has elected a diocesan bishop, the others are still under varying forms of provisional bishops.

One of the most significant changes is to the number, formation, role, and age of our parish clergy. The Episcopal Church's existing clergy are getting older on average, and our newer clergy are being ordained at later stages of life. There is an observable increase in our newer clergy being trained at non-Episcopal seminaries and in Anglican studies programs at general purpose universities; or alternatively, through diocesan education programs. The trend seems to be heading away from a standard three-year Master of Divinity for many, if not most, new clergy.

In a time when the whole of American culture is experiencing fissure and politically charged division, not to mention protracted economic stress, it should come as no surprise that people report being skeptical of their social institutions. The Church cannot realistically hope to be entirely immune from the tensions that presently cross-cut American life. In this environment, it is understandable that the expectations of, and relationships between, the church-wide staff and dioceses would get somewhat muddled. Dioceses want the

Church Center staff to be present and available for some support, but those expectations can be misunderstood, especially when a numerically diminished staff is trying to respond to the same level of demand for support and service. Steps have been taken — and will continue to be taken — by senior leadership at the Church Center to maintain both staff morale and high levels of quality response to the dioceses they seek to serve.

Our Church is changing — moving out of a deep conflict mode and into a greater focus on Mission. The stories that were shared with our Committee from across the nine provinces of The Episcopal Church were filled with hope, increased collaboration, and joy. Hope, collaboration, and joy are the images that will describe the State of the Church as we move into a new triennium.

**Action on Referred Resolutions: Resolution 2012-A010**

This Resolution was directed to the Executive Council. The Committee on the State of the Church awaits direction of the Executive Council.

**PROPOSED RESOLUTIONS**

A038: DEVELOP AN INDEX OF VITALITY

*Resolved*, the House of \_\_\_\_\_ concurring, That the House of Deputies Committee on the State of the Church be tasked with investigating the efficacy and utility of an “index of congregational vitality,” to become a part of the Parochial Report, the purpose of which would be to assess annually the health and well-being of all the congregations that constitute The Episcopal Church; and be it further

*Resolved*, That a panel of nationally recognized experts from within and outside the Church be assembled to assist the Committee on the State of the Church in carrying out the above-described task; and be it further

*Resolved*, That a supplemental amount of ten thousand dollars (\$10,000) be added to the budget of the Committee on the State of the Church to support the cost of this panel of expert consultants; and be it further

*Resolved*, That the Committee on the State of the Church report its formal recommendations on this matter to the 79th General Convention of The Episcopal Church in 2018.

**EXPLANATION**

In 2014, an internationally distinguished panel of experts published a most important report that critiqued economists’ reliance upon Gross Domestic Product per capita as the primary means of measuring social well-being in the world. Economics, they found, can help assess well-being, but it is not the only or even the best way of doing so. When a new three-part system of assessing social well-being was applied, the United States — usually ranked number one or two in the world — dropped to 16th, below many smaller and less wealthy nations. The same may be true in the Church.

While The Episcopal Church’s Parochial Report contains vital statistics that we need to know, it is neither the only way, nor perhaps the best way, of assessing congregational vitality. Many dioceses are already experimenting with their own so-called “5th page” of the annual Parochial Report in an attempt to capture a sense of exciting new ministries and signs of new and growing spiritual depth, even when other metrics may be static. Especially in the light of institutional changes that we make or that may be thrust upon us by changed and changing circumstances, the Church ought to insure that it is doing the best possible job in assessing congregational vitality. We must devise ways of sharing best-practices information as widely as

possible across the Church. We also ought to insure that congregations and dioceses are performing assessments of vitality in essentially the same manner.

**A039: FUND THE HOUSE OF DEPUTIES COMMITTEE ON THE STATE OF THE CHURCH**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church assign \$30,000 to the work of the House of Deputies Committee on the State of the Church for the 2015-2018 triennium; and be it further

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

**EXPLANATION**

Experience during the 2012-2015 triennium indicates that the House of Deputies Committee on the State of the Church will need funding in the upcoming triennium — \$10,000 for 2016; \$17,000 for 2017; and \$3,000 for 2018 — for two face-to-face meetings and for members of one or more of the subcommittees to travel as part of their work.

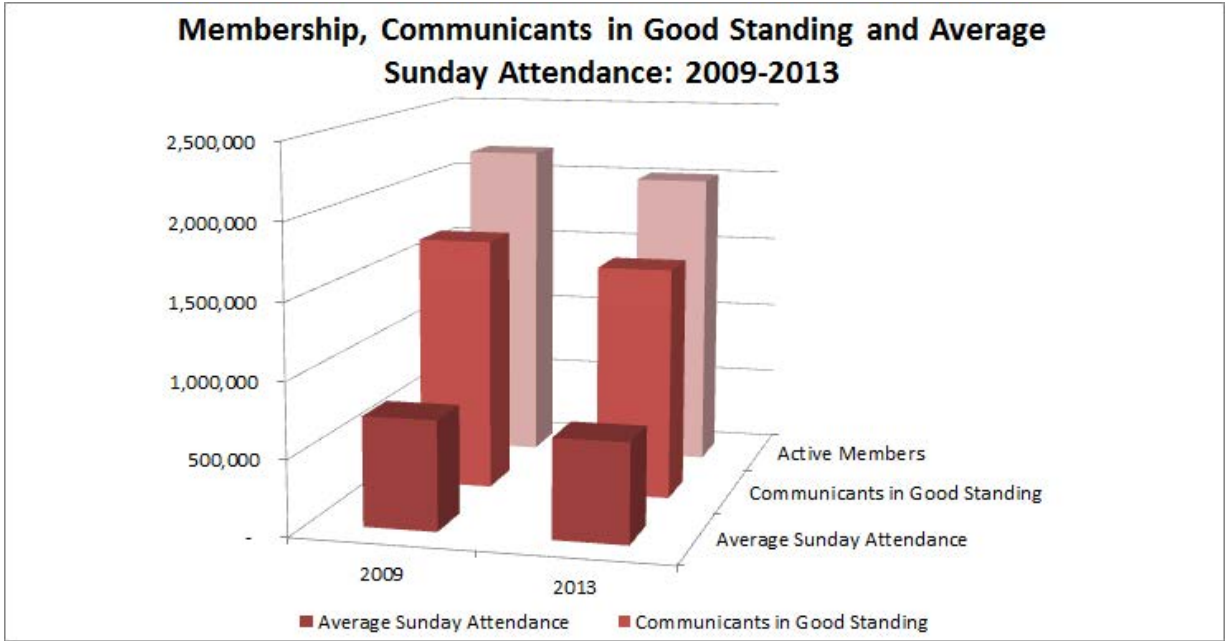
## Budget

The Committee’s budget for the triennium was \$20,000, of which approximately \$17,500 was expended.

**APPENDICES**

1. Membership, Communicants in Good Standing, and Average Sunday Attendance: 2009-2013
2. Average Sunday Attendance: 2009-2013
3. Congregational Revenues and Expenses Used for Operations: 2009-2013
4. Plate & Pledge, Operating Income, and Operating Expenses: 2009 & 2013
5. Diocesan Pledges and Income

**APPENDIX 1: Membership, Communicants in Good Standing, and Average Sunday Attendance: 2009-2013**



	Average Sunday Attendance	Communicants in Good Standing	Active Members
2009	724,845	1,694,397	2,175,748
2013	657,102	1,549,008	2,009,084

Diocese	Active Members Reported in 2009	Active Members Reported in 2013	% Change in Active Members: 2009-2013	Communicants in Good Standing in 2009	Communicants in Good Standing in 2013	% Change in Communicants in Good Standing: 2009-2013
Connecticut	60,149	54,145	-10.0%	47,119	41,852	-11.2%
Maine	13,382	12,021	-10.2%	11,089	9,848	-11.2%
Massachusetts	64,640	62,661	-3.1%	49,895	48,295	-3.2%
New Hampshire	14,787	12,740	-13.8%	11,061	10,087	-8.8%
Rhode Island	20,469	18,658	-8.8%	15,427	13,250	-14.1%
Vermont	7,349	6,596	-10.2%	5,734	5,280	-7.9%
Western Massachusetts	17,738	15,837	-10.7%	12,681	11,727	-7.5%
<b>Province 1 Subtotals</b>	<b>198,514</b>	<b>182,658</b>	<b>-8.0%</b>	<b>153,006</b>	<b>140,339</b>	<b>-8.3%</b>
Albany	18,440	15,750	-14.6%	13,589	12,652	-6.9%
Central New York	16,336	13,777	-15.7%	11,635	10,558	-9.3%
Churches in Europe	3,701	3,630	-1.9%	3,063	2,835	-7.4%
Haiti	83,698	84,301	0.7%	21,586	23,832	10.4%
Long Island	51,833	47,072	-9.2%	37,135	33,240	-10.5%
New Jersey	47,819	43,508	-9.0%	35,234	31,475	-10.7%
New York	61,670	60,084	-2.6%	46,589	46,013	-1.2%
Newark	29,223	27,546	-5.7%	23,614	21,689	-8.2%
Rochester	8,843	8,007	-9.5%	7,307	6,559	-10.2%
Virgin Islands	4,877	3,865	-20.8%	3,782	3,198	-15.4%
Western New York	11,530	10,685	-7.3%	8,554	7,050	-17.6%
<b>Province 2 Subtotals</b>	<b>337,970</b>	<b>318,225</b>	<b>-5.8%</b>	<b>212,088</b>	<b>199,101</b>	<b>-6.1%</b>
Bethlehem	12,224	10,848	-11.3%	9,274	8,312	-10.4%
Central Pennsylvania	13,848	12,646	-8.7%	11,660	10,448	-10.4%
Delaware	11,261	9,877	-12.3%	9,577	8,149	-14.9%
Easton	8,765	8,124	-7.3%	6,910	5,927	-14.2%
Maryland	42,383	40,708	-4.0%	31,382	29,645	-5.5%
Northwestern Pennsylvania	4,125	3,588	-13.0%	3,350	2,971	-11.3%
Pennsylvania	47,843	44,384	-7.2%	40,488	36,421	-10.0%
Pittsburgh	8,644	8,892	2.9%	7,122	7,280	2.2%
Southern Virginia	31,653	27,772	-12.3%	25,201	22,580	-10.4%
Southwestern Virginia	10,901	10,568	-3.1%	9,873	9,206	-6.8%
Virginia	79,852	77,229	-3.3%	64,989	62,187	-4.3%
Washington	41,338	41,012	-0.8%	31,189	30,376	-2.6%
West Virginia	8,619	8,095	-6.1%	7,599	6,574	-13.5%
<b>Province 3 Subtotals</b>	<b>321,456</b>	<b>303,743</b>	<b>-5.5%</b>	<b>258,614</b>	<b>240,076</b>	<b>-7.2%</b>

Diocese	Active Members Reported in 2009	Active Members Reported in 2013	% Change in Active Members: 2009-2013	Communicants in Good Standing in 2009	Communicants in Good Standing in 2013	% Change in Communicants in Good Standing: 2009-2013
Alabama	32,303	31,593	-2.2%	28,406	27,087	-4.6%
Atlanta	51,335	51,156	-0.3%	43,314	41,296	-4.7%
Central Florida	32,091	28,917	-9.9%	26,874	24,671	-8.2%
Central Gulf Coast	19,204	18,660	-2.8%	15,006	15,328	2.1%
East Carolina	18,422	17,137	-7.0%	16,132	14,860	-7.9%
East Tennessee	15,945	15,465	-3.0%	12,976	12,354	-4.8%
Florida	25,851	25,408	-1.7%	22,448	21,867	-2.6%
Georgia	16,931	16,043	-5.2%	14,098	12,289	-12.8%
Kentucky	9,713	8,876	-8.6%	8,198	7,104	-13.3%
Lexington	7,814	6,903	-11.7%	6,421	5,704	-11.2%
Louisiana	18,418	17,336	-5.9%	12,981	12,553	-3.3%
Mississippi	18,916	18,741	-0.9%	16,241	15,704	-3.3%
North Carolina	49,556	50,009	0.9%	40,822	41,876	2.6%
South Carolina	31,384	28,195	-10.2%	28,264	24,170	-14.5%
Southeast Florida	33,472	32,700	-2.3%	28,154	26,019	-7.6%
Southwest Florida	34,145	30,947	-9.4%	29,841	25,372	-15.0%
Tennessee	16,453	16,586	0.8%	13,509	13,611	0.8%
Upper South Carolina	25,490	24,326	-4.6%	20,898	19,932	-4.6%
West Tennessee	8,185	8,377	2.3%	7,233	6,969	-3.6%
Western North Carolina	15,802	14,965	-5.3%	14,318	13,103	-8.5%
<b>Province 4 Subtotals</b>	<b>481,430</b>	<b>462,340</b>	<b>-4.0%</b>	<b>406,134</b>	<b>381,869</b>	<b>-6.0%</b>
Chicago	38,720	37,352	-3.5%	31,637	30,177	-4.6%
Eastern Michigan	7,291	6,541	-10.3%	6,286	5,241	-16.6%
Eau Claire	2,046	1,879	-8.2%	1,845	1,496	-18.9%
Fond Du Lac	6,004	5,744	-4.3%	4,684	4,455	-4.9%
Indianapolis	10,188	9,718	-4.6%	9,116	8,500	-6.8%
Michigan	21,710	18,816	-13.3%	17,460	15,609	-10.6%
Milwaukee	10,829	9,642	-11.0%	9,420	8,217	-12.8%
Missouri	13,430	11,757	-12.5%	11,987	9,992	-16.6%
Northern Indiana	5,096	4,507	-11.6%	4,422	3,839	-13.2%
Northern Michigan	1,751	1,546	-11.7%	1,234	1,159	-6.1%
Ohio	25,102	20,042	-20.2%	20,047	16,377	-18.3%
Southern Ohio	22,447	19,971	-11.0%	19,306	16,623	-13.9%
Springfield	5,438	4,466	-17.9%	4,047	3,261	-19.4%
Western Michigan	11,112	9,732	-12.4%	9,367	7,303	-22.0%
<b>Province 5 Subtotals</b>	<b>181,164</b>	<b>161,713</b>	<b>-10.7%</b>	<b>150,858</b>	<b>132,249</b>	<b>-12.3%</b>

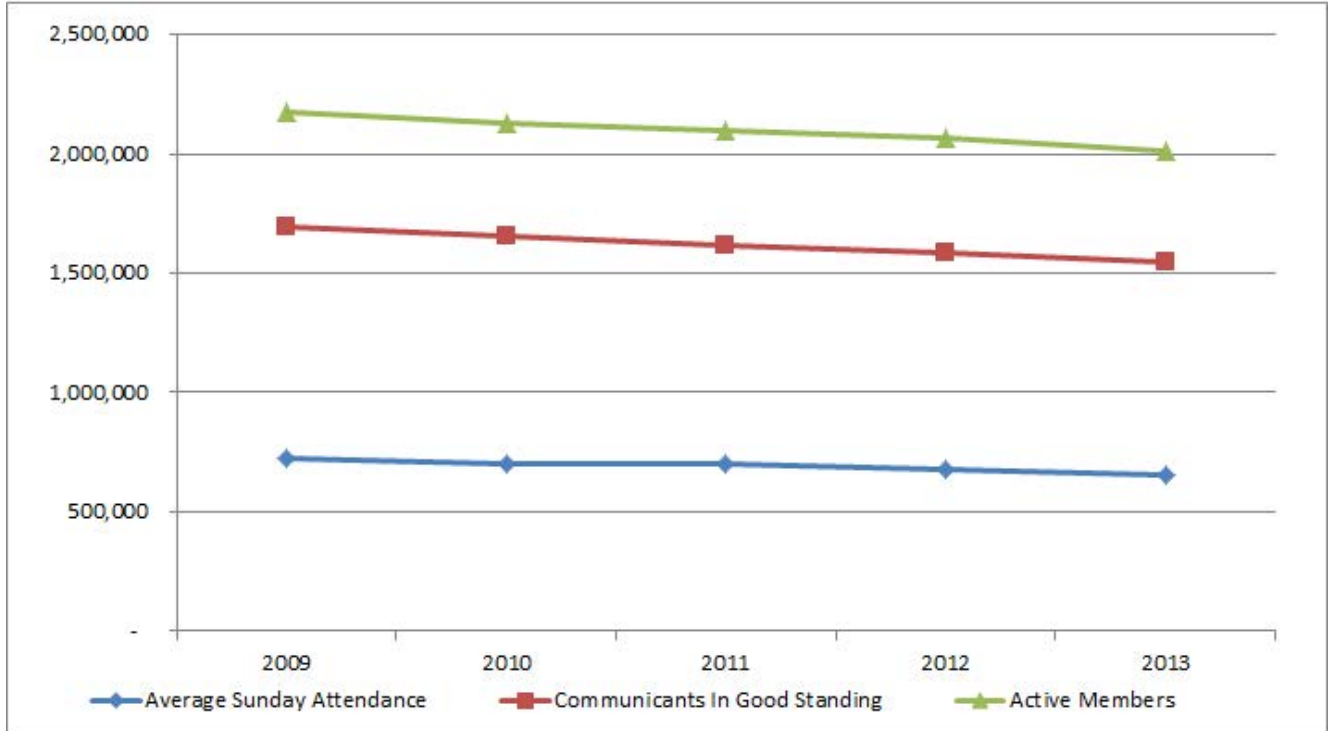
REPORTS TO THE 78<sup>TH</sup> GENERAL CONVENTION

Diocese	Active Members Reported in 2009	Active Members Reported in 2013	% Change in Active Members: 2009-2013	Communicants in Good Standing in 2009	Communicants in Good Standing in 2013	% Change in Communicants in Good Standing: 2009-2013
Colorado	26,919	26,189	-2.7%	23,205	22,227	-4.2%
Iowa	9,024	8,473	-6.1%	7,535	6,955	-7.7%
Minnesota	24,049	21,264	-11.6%	19,683	16,996	-13.7%
Montana	5,211	4,520	-13.3%	4,438	3,835	-13.6%
Nebraska	8,042	7,659	-4.8%	7,033	6,055	-13.9%
North Dakota	2,596	2,478	-4.5%	1,874	1,866	-0.4%
South Dakota	9,876	9,541	-3.4%	5,197	5,396	3.8%
Wyoming	7,205	7,190	-0.2%	6,026	5,409	-10.2%
<b>Province 6 Subtotals</b>	<b>92,922</b>	<b>87,314</b>	<b>-6.0%</b>	<b>74,991</b>	<b>68,739</b>	<b>-8.3%</b>
Arkansas	13,303	13,788	3.6%	11,247	11,579	3.0%
Dallas	32,606	31,700	-2.8%	28,625	26,931	-5.9%
Fort Worth	13,764	4,790	-65.2%	10,878	4,006	-63.2%
Kansas	11,684	10,907	-6.7%	10,333	9,078	-12.1%
Northwest Texas	7,096	6,771	-4.6%	5,298	5,071	-4.3%
Oklahoma	15,856	16,538	4.3%	13,269	14,024	5.7%
Rio Grande	11,531	11,197	-2.9%	9,875	9,584	-2.9%
Texas	78,768	76,558	-2.8%	65,240	62,643	-4.0%
West Missouri	11,323	10,168	-10.2%	9,773	8,241	-15.7%
West Texas	26,612	23,732	-10.8%	19,591	18,844	-3.8%
Western Kansas	2,030	1,573	-22.5%	1,639	1,313	-19.9%
Western Louisiana	10,202	9,268	-9.2%	8,287	7,223	-12.8%
<b>Province 7 Subtotals</b>	<b>234,775</b>	<b>216,990</b>	<b>-7.6%</b>	<b>194,055</b>	<b>178,537</b>	<b>-8.0%</b>
Alaska	7,314	7,180	-1.8%	5,660	5,256	-7.1%
Arizona	24,612	21,030	-14.6%	19,719	18,294	-7.2%
California	26,751	26,106	-2.4%	22,871	21,176	-7.4%
Eastern Oregon	2,674	2,167	-19.0%	1,938	1,607	-17.1%
El Camino Real	13,195	12,376	-6.2%	10,314	9,165	-11.1%
Hawaii	7,442	6,561	-11.8%	6,210	5,502	-11.4%
Idaho	5,252	4,898	-6.7%	4,584	4,144	-9.6%
Los Angeles	63,912	54,329	-15.0%	48,352	40,510	-16.2%
Micronesia	257	241	-6.2%	248	120	-51.6%
Navaho Missions	587	660	12.4%	456	503	10.3%
Nevada	5,547	5,278	-4.8%	5,168	4,732	-8.4%
Northern California	13,692	13,493	-1.5%	12,162	12,025	-1.1%
Olympia	29,087	26,455	-9.0%	23,107	21,228	-8.1%
Oregon	18,340	16,705	-8.9%	14,882	12,718	-14.5%
San Diego	17,665	14,992	-15.1%	15,010	12,620	-15.9%
San Joaquin	2,169	2,083	-4.0%	1,822	1,679	-7.8%
Spokane	6,627	5,742	-13.4%	5,688	4,787	-15.8%
Taiwan	1,113	1,235	11.0%	869	883	1.6%
Utah	5,522	5,516	-0.1%	4,767	4,432	-7.0%
<b>Province 8 Subtotals</b>	<b>251,758</b>	<b>227,047</b>	<b>-9.8%</b>	<b>203,827</b>	<b>181,381</b>	<b>-11.0%</b>



Diocese	Active Members Reported in 2009	Active Members Reported in 2013	% Change in Active Members: 2009-2013	Communicants in Good Standing in 2009	Communicants in Good Standing in 2013	% Change in Communicants in Good Standing: 2009-2013
Colombia	3,062	2,913	-4.9%	1,293	1,188	-8.1%
Dominican Republic	6,090	6,026	-1.1%	3,504	3,652	4.2%
Ecuador Central	2,285	2,521	10.3%	1,599	1,586	-0.8%
Ecuador Litoral	8,007	9,877	23.4%	1,129	2,462	118.1%
Honduras	50,207	21,367	-57.4%	29,285	12,924	-55.9%
Puerto Rico	5,311	5,471	3.0%	3,475	4,431	27.5%
Venezuela	797	879	10.3%	539	474	-12.1%
<b>Province 9 Subtotals</b>	<b>75,759</b>	<b>49,054</b>	<b>-35.2%</b>	<b>40,824</b>	<b>26,717</b>	<b>-34.6%</b>
<b>The Episcopal Church</b>	<b>2,175,748</b>	<b>2,009,084</b>	<b>-7.7%</b>	<b>1,694,397</b>	<b>1,549,008</b>	<b>-8.6%</b>

**APPENDIX 2: Average Sunday Attendance: 2009-2013**



**Average Sunday Attendance: 2009-2013**

	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>% Change 2009-2013</u>
<b>Average Sunday Attendance</b>	724,845	697,880	698,376	679,923	657,102	-9.3%
<b>Communicants In Good Standing</b>	1,694,397	1,652,246	1,612,827	1,588,057	1,549,008	-8.6%
<b>Active Members</b>	2,175,748	2,125,012	2,096,389	2,066,710	2,009,084	-7.7%

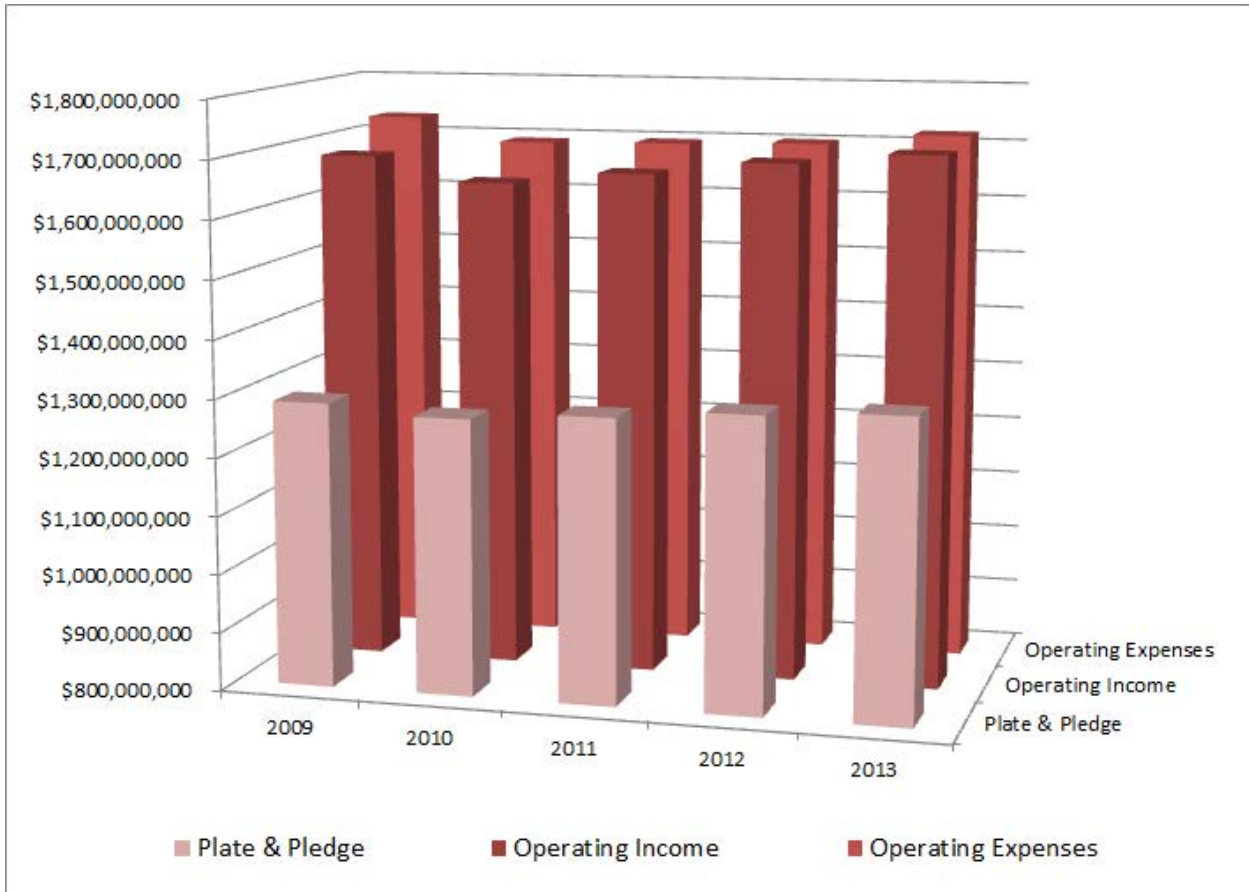
Diocese	ASA 2009	ASA 2010	ASA 2011	ASA 2012	ASA 2013	% Change in ASA: 2009-2013	ASA 2013 as a % of Active Members
Connecticut	17,857	17,767	17,095	16,407	15,889	-11.0%	29.3%
Maine	4,737	4,662	4,526	4,339	4,110	-13.2%	34.2%
Massachusetts	18,130	17,903	17,740	17,557	16,647	-8.2%	26.6%
New Hampshire	4,122	4,164	4,063	4,027	3,810	-7.6%	29.9%
Rhode Island	5,601	5,523	5,299	5,223	5,140	-8.2%	27.5%
Vermont	2,537	2,387	2,404	2,354	2,265	-10.7%	34.3%
Western Massachusetts	5,252	5,208	5,189	4,996	4,653	-11.4%	29.4%
<b>Province 1 Subtotals</b>	<b>58,236</b>	<b>57,614</b>	<b>56,316</b>	<b>54,903</b>	<b>52,514</b>	<b>-9.8%</b>	<b>28.7%</b>
Albany	6,597	6,479	6,611	6,532	6,277	-4.9%	39.9%
Central New York	5,024	4,817	4,714	4,595	4,357	-13.3%	31.6%
Churches in Europe	1,274	1,232	1,132	1,067	1,086	-14.8%	29.9%
Haiti	16,631	15,623	16,803	16,112	14,199	-14.6%	16.8%
Long Island	15,123	15,181	15,225	14,752	14,156	-6.4%	30.1%
New Jersey	14,919	14,470	14,165	13,616	13,043	-12.6%	30.0%
New York	19,627	19,029	19,540	18,935	18,727	-4.6%	31.2%
Newark	9,054	8,858	8,706	8,630	8,473	-6.4%	30.8%
Rochester	3,483	3,335	3,216	3,165	3,098	-11.1%	38.7%
Virgin Islands	1,943	1,980	1,834	1,821	1,866	-4.0%	48.3%
Western New York	3,849	3,741	3,814	3,769	3,508	-8.9%	32.8%
<b>Province 2 Subtotals</b>	<b>97,524</b>	<b>94,745</b>	<b>95,760</b>	<b>92,994</b>	<b>88,790</b>	<b>-9.0%</b>	<b>27.9%</b>
Bethlehem	4,006	3,935	3,775	3,715	3,594	-10.3%	33.1%
Central Pennsylvania	5,003	4,818	4,818	4,580	4,536	-9.3%	35.9%
Delaware	3,880	3,686	3,614	3,465	3,354	-13.6%	34.0%
Easton	3,068	2,904	2,844	2,788	2,714	-11.5%	33.4%
Maryland	11,520	11,144	11,260	10,743	10,483	-9.0%	25.8%
Northwestern Pennsylvania	1,671	1,569	1,544	1,502	1,493	-10.7%	41.6%
Pennsylvania	15,158	14,652	14,559	14,246	13,726	-9.4%	30.9%
Pittsburgh	2,481	2,378	2,438	2,451	2,409	-2.9%	27.1%
Southern Virginia	10,779	10,338	10,045	10,000	9,768	-9.4%	35.2%
Southwestern Virginia	4,291	4,266	4,410	4,250	4,163	-3.0%	39.4%
Virginia	24,771	24,168	24,706	24,146	23,953	-3.3%	31.0%
Washington	15,072	14,497	14,692	14,157	13,813	-8.4%	33.7%
West Virginia	3,194	3,015	2,957	2,887	2,902	-9.1%	35.8%
<b>Province 3 Subtotals</b>	<b>104,894</b>	<b>101,370</b>	<b>101,662</b>	<b>98,930</b>	<b>96,908</b>	<b>-7.6%</b>	<b>31.9%</b>

Diocese	ASA 2009	ASA 2010	ASA 2011	ASA 2012	ASA 2013	% Change in ASA: 2009-2013	ASA 2013 as a % of Active Members
Alabama	10,326	10,369	10,401	10,004	9,713	-5.9%	30.7%
Atlanta	16,834	16,513	16,596	16,103	15,684	-6.8%	30.7%
Central Florida	14,059	13,494	13,477	13,294	13,318	-5.3%	46.1%
Central Gulf Coast	6,527	6,244	6,258	6,289	5,942	-9.0%	31.8%
East Carolina	7,079	7,048	7,015	6,819	6,450	-8.9%	37.6%
East Tennessee	5,525	5,336	5,478	5,323	5,200	-5.9%	33.6%
Florida	9,153	8,847	8,956	8,659	8,615	-5.9%	33.9%
Georgia	6,472	6,380	6,346	6,104	5,804	-10.3%	36.2%
Kentucky	3,676	3,633	3,519	3,344	3,314	-9.8%	37.3%
Lexington	2,930	2,693	2,841	2,828	2,878	-1.8%	41.7%
Louisiana	5,217	4,983	4,962	4,819	4,720	-9.5%	27.2%
Mississippi	6,499	6,426	6,671	6,429	6,293	-3.2%	33.6%
North Carolina	15,446	15,003	15,587	15,221	14,729	-4.6%	29.5%
South Carolina	13,885	11,994	12,338	12,371	12,005	-13.5%	42.6%
Southeast Florida	12,832	12,807	13,037	13,140	12,442	-3.0%	38.0%
Southwest Florida	14,271	13,802	13,733	13,237	12,952	-9.2%	41.9%
Tennessee	5,788	5,650	5,841	5,881	5,745	-0.7%	34.6%
Upper South Carolina	8,337	8,124	8,214	7,812	7,601	-8.8%	31.2%
West Tennessee	3,439	3,351	3,447	3,346	3,232	-6.0%	38.6%
Western North Carolina	6,471	6,259	6,561	6,327	6,517	0.7%	43.5%
<b>Province 4 Subtotals</b>	<b>174,766</b>	<b>168,956</b>	<b>171,278</b>	<b>167,350</b>	<b>163,154</b>	<b>-6.6%</b>	<b>35.3%</b>
Chicago	14,237	13,288	12,869	13,202	13,072	-8.2%	35.0%
Eastern Michigan	2,709	2,567	2,404	2,349	2,239	-17.3%	34.2%
Eau Claire	872	804	790	751	762	-12.6%	40.6%
Fond Du Lac	2,266	2,165	2,135	2,176	2,065	-8.9%	36.0%
Indianapolis	4,305	4,063	4,052	3,934	3,896	-9.5%	40.1%
Michigan	7,310	7,230	7,170	7,006	6,791	-7.1%	36.1%
Milwaukee	4,321	4,047	4,020	3,895	3,671	-15.0%	38.1%
Missouri	4,529	4,128	4,160	3,951	3,829	-15.5%	32.6%
Northern Indiana	2,350	2,356	2,349	2,355	2,223	-5.4%	49.3%
Northern Michigan	624	626	592	568	526	-15.7%	34.0%
Ohio	8,493	8,237	7,971	6,821	6,621	-22.0%	33.0%
Southern Ohio	8,088	7,579	7,502	7,222	7,133	-11.8%	35.7%
Springfield	2,045	1,961	1,945	1,830	1,620	-20.8%	36.3%
Western Michigan	4,360	4,197	4,122	3,982	3,864	-11.4%	39.7%
<b>Province 5 Subtotals</b>	<b>66,509</b>	<b>63,248</b>	<b>62,081</b>	<b>60,042</b>	<b>58,312</b>	<b>-12.3%</b>	<b>36.1%</b>
Colorado	10,514	10,320	10,497	10,083	9,995	-4.9%	38.2%
Iowa	3,064	2,929	2,885	2,812	2,724	-11.1%	32.1%
Minnesota	7,782	7,250	7,347	7,325	7,108	-8.7%	33.4%
Montana	1,626	1,623	1,621	1,616	1,561	-4.0%	34.5%
Nebraska	3,033	2,814	2,833	2,725	2,694	-11.2%	35.2%
North Dakota	790	758	707	696	689	-12.8%	27.8%
South Dakota	2,179	2,168	2,302	2,118	2,106	-3.4%	22.1%
Wyoming	2,123	1,972	1,935	1,903	1,820	-14.3%	25.3%
<b>Province 6 Subtotals</b>	<b>31,111</b>	<b>29,834</b>	<b>30,127</b>	<b>29,278</b>	<b>28,697</b>	<b>-7.8%</b>	<b>32.9%</b>

Diocese	ASA 2009	ASA 2010	ASA 2011	ASA 2012	ASA 2013	% Change in ASA: 2009-2013	ASA 2013 as a % of Active Members
Arkansas	4,634	4,656	4,843	4,940	4,789	3.3%	34.7%
Dallas	11,721	11,318	11,552	11,494	11,232	-4.2%	35.4%
Fort Worth	5,485	1,995	1,633	1,511	1,485	-72.9%	31.0%
Kansas	4,198	4,038	4,057	3,970	3,806	-9.3%	34.9%
Northwest Texas	2,047	1,972	1,881	1,810	1,805	-11.8%	26.7%
Oklahoma	5,584	5,585	5,716	5,547	5,477	-1.9%	33.1%
Rio Grande	4,210	3,994	3,944	4,025	3,813	-9.4%	34.1%
Texas	27,042	26,282	26,489	25,500	25,254	-6.6%	33.0%
West Missouri	4,140	3,791	3,811	3,640	3,463	-16.4%	34.1%
West Texas	9,491	9,262	9,291	9,136	8,987	-5.3%	37.9%
Western Kansas	751	740	731	665	653	-13.0%	41.5%
Western Louisiana	3,582	3,579	3,487	3,446	3,208	-10.4%	34.6%
<b>Province 7 Subtotals</b>	<b>82,885</b>	<b>77,212</b>	<b>77,435</b>	<b>75,684</b>	<b>73,972</b>	<b>-10.8%</b>	<b>34.1%</b>
Alaska	1,831	1,777	1,717	1,760	1,573	-14.1%	21.9%
Arizona	9,002	8,520	8,579	8,502	8,436	-6.3%	40.1%
California	8,792	8,484	8,431	8,212	8,065	-8.3%	30.9%
Eastern Oregon	1,106	1,105	1,095	1,024	960	-13.2%	44.3%
El Camino Real	4,627	4,415	4,315	4,080	4,025	-13.0%	32.5%
Hawaii	3,282	3,056	3,057	3,012	3,106	-5.4%	47.3%
Idaho	1,752	1,716	1,654	1,596	1,559	-11.0%	31.8%
Los Angeles	19,815	19,027	18,569	16,804	16,435	-17.1%	30.3%
Micronesia	135	128	133	141	110	-18.5%	45.6%
Navaho Missions	198	197	220	187	198	0.0%	30.0%
Nevada	2,116	2,200	2,384	2,549	2,466	16.5%	46.7%
Northern California	5,590	5,507	5,525	5,552	5,470	-2.1%	40.5%
Olympia	9,894	9,544	9,607	9,419	9,583	-3.1%	36.2%
Oregon	6,641	6,547	6,439	6,480	6,248	-5.9%	37.4%
San Diego	7,223	6,772	6,492	6,108	5,857	-18.9%	39.1%
San Joaquin	948	943	943	944	914	-3.6%	43.9%
Spokane	2,299	2,112	2,114	2,017	1,924	-16.3%	33.5%
Taiwan	869	668	687	687	712	-18.1%	57.7%
Utah	1,770	1,765	1,856	1,715	1,676	-5.3%	30.4%
<b>Province 8 Subtotals</b>	<b>87,890</b>	<b>84,483</b>	<b>83,817</b>	<b>80,789</b>	<b>79,317</b>	<b>-9.8%</b>	<b>34.9%</b>
Colombia	1,364	1,364	1,203	1,223	1,184	-13.2%	40.6%
Dominican Republic	3,063	2,908	3,171	3,142	3,080	0.6%	51.1%
Ecuador Central	1,379	1,219	1,219	1,219	1,219	-11.6%	48.4%
Ecuador Litoral	891	920	1,044	1,088	1,018	14.3%	10.3%
Honduras	11,467	10,981	10,252	10,237	5,834	-49.1%	27.3%
Puerto Rico	2,377	2,537	2,497	2,494	2,661	11.9%	48.6%
Venezuela	489	489	514	550	442	-9.6%	50.3%
<b>Province 9 Subtotals</b>	<b>21,030</b>	<b>20,418</b>	<b>19,900</b>	<b>19,953</b>	<b>15,438</b>	<b>-26.6%</b>	<b>31.5%</b>
<b>The Episcopal Church</b>	<b>724,845</b>	<b>697,880</b>	<b>698,376</b>	<b>679,923</b>	<b>657,102</b>	<b>-9.3%</b>	<b>32.7%</b>

**APPENDIX 3: Congregational Revenues and Expenses Used for Operations: 2009-2013**

<u>Domestic Totals</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
Operating Income	\$1,682,099,099	\$1,641,197,085	\$1,662,957,996	\$1,686,854,528	\$1,706,135,870
Operating Expenses	\$1,731,022,916	\$1,690,765,807	\$1,694,243,215	\$1,698,971,105	\$1,718,420,614
Plate & Pledge	\$1,289,458,871	\$1,273,709,000	\$1,287,579,781	\$1,303,458,185	\$1,313,395,473



**% change between 2009-2013**

Operating Income	1.4%
Operating Expenses	-0.7%
Plate & Pledge	1.9%

Dollars reported are not adjusted for inflation.

**APPENDIX 4: Plate & Pledge, Operating Income, and Operating Expenses: 2009 & 2013**

Diocese	2009 Plate & Pledge	2009 Operating Income	2009 Operating Expense	2013 Plate & Pledge	2013 Operating Income	2013 Operating Expense	2009-2013 Change In Plate & Pledge
Connecticut	\$33,694,548	\$50,472,293	\$53,192,305	\$33,598,850	\$48,218,120	\$49,922,432	-0.3%
Maine	\$7,609,769	\$10,389,879	\$10,522,766	\$7,310,202	\$9,836,770	\$9,830,984	-3.9%
Massachusetts	\$31,469,651	\$46,276,249	\$46,086,229	\$32,947,418	\$49,136,266	\$46,332,643	4.7%
New Hampshire	\$6,607,809	\$8,730,877	\$8,971,760	\$6,785,016	\$8,872,846	\$8,983,587	2.7%
Rhode Island	\$7,978,954	\$13,083,255	\$13,204,916	\$8,049,866	\$12,498,647	\$12,350,469	0.9%
Vermont	\$3,916,415	\$5,747,339	\$5,902,729	\$3,790,038	\$5,503,286	\$5,531,827	-3.2%
Western Massachusetts	\$7,679,583	\$11,062,823	\$11,412,679	\$7,483,212	\$10,777,445	\$10,815,779	-2.6%
<b>Province 1 Subtotals</b>	<b>\$98,956,729</b>	<b>\$145,762,715</b>	<b>\$149,293,384</b>	<b>\$99,964,602</b>	<b>\$144,843,380</b>	<b>\$143,767,721</b>	<b>1.0%</b>
Albany	\$7,908,284	\$11,624,523	\$12,268,080	\$8,339,945	\$11,887,831	\$12,223,084	5.5%
Central New York	\$7,008,756	\$10,373,166	\$10,582,166	\$7,024,558	\$10,490,981	\$10,350,160	0.2%
Long Island	\$20,507,077	\$32,865,723	\$33,395,817	\$21,457,095	\$35,031,896	\$35,780,640	4.6%
New Jersey	\$21,677,350	\$30,902,414	\$32,693,632	\$21,788,581	\$30,943,798	\$31,636,354	0.5%
New York	\$33,191,949	\$66,399,418	\$84,346,040	\$34,702,672	\$73,487,402	\$87,067,262	4.6%
Newark	\$16,000,174	\$23,439,703	\$25,256,958	\$15,837,648	\$23,241,873	\$23,791,730	-1.0%
Rochester	\$5,387,335	\$7,469,272	\$8,390,202	\$5,394,752	\$7,916,338	\$8,087,652	0.1%
Western New York	\$5,317,841	\$8,111,850	\$7,971,126	\$5,050,670	\$8,013,616	\$8,111,931	-5.0%
<b>Province 2 Subtotals</b>	<b>\$116,998,766</b>	<b>\$191,186,069</b>	<b>\$214,904,021</b>	<b>\$119,595,921</b>	<b>\$201,013,735</b>	<b>\$217,048,813</b>	<b>2.2%</b>
Bethlehem	\$5,661,265	\$9,060,160	\$9,474,581	\$5,761,023	\$8,603,396	\$8,798,447	1.8%
Central Pennsylvania	\$8,165,129	\$10,779,697	\$10,993,332	\$8,053,858	\$10,923,517	\$11,096,567	-1.4%
Delaware	\$6,709,859	\$10,298,777	\$10,440,479	\$6,424,086	\$9,546,509	\$9,751,426	-4.3%
Easton	\$5,147,650	\$6,585,901	\$6,515,182	\$5,057,465	\$6,635,808	\$6,545,464	-1.8%
Maryland	\$21,842,354	\$29,991,421	\$30,416,148	\$21,744,608	\$29,770,244	\$30,061,256	-0.4%
Northwestern Pennsylvania	\$2,397,975	\$3,902,180	\$3,863,846	\$2,222,584	\$3,857,200	\$3,964,542	-7.3%
Pennsylvania	\$28,149,961	\$43,774,544	\$45,900,883	\$29,560,781	\$45,255,377	\$45,561,709	5.0%
Pittsburgh	\$4,477,239	\$6,130,975	\$6,459,180	\$4,824,272	\$6,731,200	\$6,658,684	7.8%
Southern Virginia	\$20,732,181	\$25,808,942	\$26,192,818	\$21,169,076	\$26,299,074	\$25,907,387	2.1%
Southwestern Virginia	\$8,710,679	\$10,263,100	\$10,468,957	\$9,463,870	\$10,838,597	\$10,697,999	8.6%
Virginia	\$54,808,006	\$66,911,502	\$66,101,228	\$56,456,945	\$70,557,012	\$68,380,808	3.0%
Washington	\$31,160,956	\$60,017,532	\$61,424,021	\$33,850,890	\$53,641,414	\$56,174,382	8.6%
West Virginia	\$6,087,046	\$7,767,510	\$8,016,210	\$5,619,621	\$7,547,395	\$7,555,197	-7.7%
<b>Province 3 Subtotals</b>	<b>\$204,050,300</b>	<b>\$291,292,241</b>	<b>\$296,266,865</b>	<b>\$210,209,079</b>	<b>\$290,206,743</b>	<b>\$291,153,868</b>	<b>3.0%</b>

\* Dollars reported are not adjusted for inflation. \*\*In dollars using December 31 exchange rate for each year.

Diocese	2009 Plate & Pledge	2009 Operating Income	2009 Operating Expense	2013 Plate & Pledge	2013 Operating Income	2013 Operating Expense	2009-2013 Change In Plate & Pledge
Alabama	\$27,882,470	\$30,737,117	\$31,036,524	\$29,210,787	\$31,791,554	\$31,493,825	4.8%
Atlanta	\$38,294,824	\$41,582,901	\$42,259,670	\$39,935,503	\$43,721,358	\$43,752,171	4.3%
Central Florida	\$22,493,753	\$27,305,901	\$27,307,082	\$23,660,111	\$29,654,617	\$29,148,872	5.2%
Central Gulf Coast	\$14,054,157	\$15,884,274	\$16,458,421	\$14,912,309	\$17,078,102	\$16,363,742	6.1%
East Carolina	\$12,921,575	\$14,408,986	\$13,843,607	\$13,151,161	\$14,452,674	\$13,971,535	1.8%
East Tennessee	\$13,300,647	\$14,918,280	\$15,135,564	\$13,886,992	\$15,563,347	\$15,431,721	4.4%
Florida	\$18,098,830	\$20,777,337	\$20,604,690	\$19,006,070	\$21,442,782	\$21,514,568	5.0%
Georgia	\$13,902,011	\$15,702,270	\$15,077,901	\$13,844,301	\$15,584,668	\$15,301,567	-0.4%
Kentucky	\$7,085,868	\$8,746,908	\$8,926,098	\$7,352,432	\$8,907,523	\$9,041,290	3.8%
Lexington	\$5,652,224	\$6,985,971	\$7,242,838	\$5,955,397	\$7,263,088	\$7,443,650	5.4%
Louisiana	\$10,449,596	\$13,883,327	\$14,787,316	\$11,296,922	\$13,924,877	\$14,946,543	8.1%
Mississippi	\$15,408,842	\$18,017,780	\$17,763,500	\$16,719,344	\$19,193,443	\$18,652,096	8.5%
North Carolina	\$34,860,212	\$38,159,366	\$38,290,019	\$36,803,876	\$40,177,529	\$40,456,227	5.6%
South Carolina	\$30,425,697	\$34,801,404	\$34,227,311	\$27,590,381	\$30,295,634	\$27,835,705	-9.3%
Southeast Florida	\$19,143,870	\$25,250,249	\$26,416,127	\$19,750,971	\$26,162,642	\$26,625,245	3.2%
Southwest Florida	\$24,719,268	\$29,524,780	\$30,363,901	\$24,877,353	\$30,328,902	\$30,177,709	0.6%
Tennessee	\$13,162,642	\$14,896,472	\$14,282,903	\$14,168,129	\$16,064,059	\$15,932,912	7.6%
Upper South Carolina	\$19,195,918	\$20,564,393	\$20,726,126	\$19,535,809	\$20,655,935	\$20,634,037	1.8%
West Tennessee	\$10,338,301	\$12,876,796	\$12,305,157	\$10,938,164	\$11,912,863	\$11,957,668	5.8%
Western North Carolina	\$12,502,064	\$14,364,388	\$14,434,112	\$12,972,965	\$14,807,326	\$14,906,670	3.8%
<b>Province 4 Subtotals</b>	<b>\$363,892,769</b>	<b>\$419,388,900</b>	<b>\$421,488,867</b>	<b>\$375,568,977</b>	<b>\$428,982,923</b>	<b>\$425,587,753</b>	<b>3.2%</b>
Chicago	\$27,632,109	\$35,672,072	\$36,666,428	\$26,714,943	\$34,403,954	\$34,553,273	-3.3%
Eastern Michigan	\$3,976,049	\$5,070,971	\$5,409,783	\$3,633,162	\$4,926,331	\$5,208,686	-8.6%
Eau Claire	\$1,340,387	\$1,588,697	\$1,551,873	\$1,162,492	\$1,469,831	\$1,441,172	-13.3%
Fond Du Lac	\$3,700,359	\$4,578,626	\$4,876,944	\$3,779,291	\$4,756,299	\$4,642,201	2.1%
Indianapolis	\$7,048,916	\$16,096,937	\$15,603,561	\$6,945,969	\$14,129,980	\$14,356,763	-1.5%
Michigan	\$14,311,827	\$17,856,977	\$18,577,152	\$14,253,294	\$17,850,794	\$17,826,619	-0.4%
Milwaukee	\$8,268,472	\$10,705,747	\$10,960,392	\$7,665,737	\$9,540,546	\$9,651,330	-7.3%
Missouri	\$8,809,920	\$11,781,005	\$12,126,733	\$9,504,277	\$12,343,446	\$12,298,924	7.9%
Northern Indiana	\$3,890,298	\$5,132,897	\$5,158,868	\$3,908,727	\$4,614,692	\$4,583,074	0.5%
Northern Michigan	\$628,732	\$1,025,864	\$986,957	\$523,823	\$967,015	\$866,125	-16.7%
Ohio	\$13,369,835	\$19,136,495	\$19,314,181	\$13,182,556	\$18,772,825	\$18,439,025	-1.4%
Southern Ohio	\$15,274,040	\$22,369,442	\$22,930,660	\$14,848,861	\$21,516,512	\$20,923,982	-2.8%
Springfield	\$3,604,305	\$4,896,921	\$4,912,227	\$3,280,151	\$4,431,119	\$4,290,228	-9.0%
Western Michigan	\$7,483,125	\$9,129,759	\$9,183,016	\$7,407,601	\$9,089,660	\$8,919,425	-1.0%
<b>Province 5 Subtotals</b>	<b>\$119,338,374</b>	<b>\$165,042,410</b>	<b>\$168,258,775</b>	<b>\$116,810,884</b>	<b>\$158,813,004</b>	<b>\$158,000,827</b>	<b>-2.1%</b>
Colorado	\$19,874,247	\$25,229,242	\$25,252,079	\$21,298,105	\$27,076,737	\$27,292,447	7.2%
Iowa	\$5,529,873	\$7,230,931	\$7,548,136	\$5,377,341	\$7,018,516	\$6,858,823	-2.8%
Minnesota	\$14,568,035	\$17,574,438	\$17,910,261	\$13,768,587	\$16,555,825	\$17,701,156	-5.5%
Montana	\$2,833,864	\$3,455,514	\$3,521,308	\$3,105,467	\$3,616,926	\$3,590,649	9.6%
Nebraska	\$4,818,691	\$6,031,993	\$6,704,483	\$4,943,430	\$6,344,368	\$6,251,250	2.6%
North Dakota	\$919,994	\$1,153,729	\$1,208,513	\$995,179	\$1,281,398	\$1,200,928	8.2%
South Dakota	\$1,964,514	\$2,474,059	\$2,496,697	\$1,877,086	\$2,459,970	\$2,340,186	-4.5%
Wyoming	\$3,129,964	\$3,750,498	\$4,031,213	\$3,351,386	\$4,523,987	\$4,477,238	7.1%
<b>Province 6 Subtotals</b>	<b>\$53,639,182</b>	<b>\$66,900,404</b>	<b>\$68,672,690</b>	<b>\$54,716,581</b>	<b>\$68,877,727</b>	<b>\$69,712,677</b>	<b>2.0%</b>

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Diocese	2009 Plate & Pledge	2009 Operating Income	2009 Operating Expense	2013 Plate & Pledge	2013 Operating Income	2013 Operating Expense	2009-2013 Change In Plate & Pledge
Arkansas	\$10,605,412	\$11,957,587	\$ 11,908,762	\$ 11,631,927	\$13,644,969	\$13,504,956	9.7%
Dallas	\$24,555,620	\$27,556,894	\$ 28,058,491	\$ 25,997,137	\$28,971,354	\$29,458,260	5.9%
Fort Worth	\$ 9,825,533	\$10,516,360	\$ 9,698,179	\$ 3,597,884	\$3,910,626	\$3,938,202	-63.4%
Kansas	\$ 7,479,262	\$ 8,430,405	\$ 8,511,624	\$ 7,444,410	\$8,739,139	\$9,025,351	-0.5%
Northwest Texas	\$ 4,888,307	\$ 5,624,544	\$ 5,713,080	\$ 5,183,932	\$6,071,670	\$6,223,923	6.0%
Oklahoma	\$11,771,038	\$13,844,943	\$ 14,208,733	\$ 12,708,835	\$14,974,221	\$14,973,918	8.0%
Rio Grande	\$ 7,673,696	\$ 9,320,697	\$ 9,484,386	\$ 7,963,031	\$9,417,044	\$9,284,966	3.8%
Texas	\$64,693,826	\$73,361,444	\$ 76,891,382	\$ 70,476,425	\$79,802,839	\$79,613,605	8.9%
West Missouri	\$ 7,625,521	\$10,378,315	\$ 10,255,274	\$ 7,287,003	\$10,058,901	\$9,548,232	-4.4%
West Texas	\$22,598,811	\$25,905,615	\$ 25,362,841	\$ 24,068,064	\$27,885,468	\$26,979,869	6.5%
Western Kansas	\$ 990,957	\$ 1,331,091	\$ 1,473,574	\$ 987,901	\$1,358,241	\$1,341,550	-0.3%
Western Louisiana	\$ 8,700,213	\$ 9,781,752	\$ 9,640,491	\$ 8,883,740	\$9,787,174	\$10,023,634	2.1%
<b>Province 7 Subtotals</b>	<b>\$181,408,196</b>	<b>\$208,009,647</b>	<b>\$211,206,817</b>	<b>\$186,230,289</b>	<b>\$214,621,646</b>	<b>\$213,916,466</b>	<b>2.7%</b>
Alaska	\$ 2,453,051	\$ 2,881,994	\$ 2,965,241	\$ 2,661,818	\$3,079,218	\$3,069,673	8.5%
Arizona	\$13,924,534	\$16,103,890	\$ 16,986,470	\$ 14,271,648	\$16,585,121	\$17,266,353	2.5%
California	\$19,805,415	\$26,483,122	\$ 26,681,607	\$ 20,174,097	\$27,419,368	\$27,515,705	1.9%
Eastern Oregon	\$ 1,548,533	\$ 1,838,153	\$ 1,953,071	\$ 1,598,407	\$1,838,438	\$2,011,009	3.2%
El Camino Real	\$ 8,271,176	\$10,273,743	\$ 10,747,715	\$ 8,094,918	\$10,532,062	\$10,538,088	-2.1%
Hawaii	\$ 4,993,469	\$ 9,016,263	\$ 9,290,338	\$ 4,777,802	\$9,231,391	\$9,226,640	-4.3%
Idaho	\$ 2,672,468	\$ 3,096,522	\$ 3,114,010	\$ 2,668,716	\$3,341,809	\$3,158,311	-0.1%
Los Angeles	\$34,577,555	\$46,645,404	\$ 49,381,189	\$ 33,074,122	\$47,089,299	\$47,104,471	-4.3%
Navaho Missions	\$ 32,983	\$ 164,736	\$ 211,674	\$ 39,437	\$71,834	\$ 185,287	19.6%
Nevada	\$ 2,764,750	\$ 3,715,915	\$ 3,541,764	\$ 2,776,787	\$3,310,690	\$3,221,748	0.4%
Northern California	\$10,470,839	\$12,410,043	\$ 12,275,507	\$ 10,228,559	\$12,434,729	\$12,003,590	-2.3%
Olympia	\$19,679,285	\$24,444,287	\$ 24,763,098	\$ 20,080,177	\$25,282,826	\$25,090,680	2.0%
Oregon	\$10,605,780	\$12,486,265	\$ 12,734,704	\$ 10,707,716	\$12,979,399	\$13,107,037	1.0%
San Diego	\$11,462,698	\$14,604,978	\$ 15,881,245	\$ 11,498,262	\$15,146,011	\$15,485,444	0.3%
San Joaquin	\$ 1,689,681	\$ 1,816,527	\$ 1,863,246	\$ 1,604,590	\$1,940,152	\$1,936,585	-5.0%
Spokane	\$ 3,614,510	\$ 4,534,939	\$ 4,660,534	\$ 3,428,341	\$4,363,383	\$4,346,127	-5.2%
Utah	\$ 2,607,828	\$ 3,999,932	\$ 3,880,084	\$ 2,613,743	\$4,130,982	\$3,965,741	0.2%
<b>Province 8 Subtotals</b>	<b>\$151,174,555</b>	<b>\$194,516,713</b>	<b>\$200,931,497</b>	<b>\$150,299,140</b>	<b>\$198,776,712</b>	<b>\$199,232,489</b>	<b>-0.6%</b>
<b>Domestic Totals</b>	<b>\$1,289,458,871</b>	<b>\$1,682,099,099</b>	<b>\$1,731,022,916</b>	<b>\$1,313,395,473</b>	<b>\$1,706,135,870</b>	<b>\$1,718,420,614</b>	<b>1.9%</b>
Churches in Europe**	\$2,206,990	\$3,722,740	\$3,698,690	\$2,240,950	\$3,709,860	\$4,118,040	1.5%
Micronesia	\$79,318	\$171,545	\$89,844	\$87,373	\$126,751	\$80,972	10.2%
Puerto Rico	\$357,419	\$1,150,217	\$1,598,499	\$432,330	\$1,203,841	\$1,465,439	21.0%
Virgin Islands	\$2,187,484	\$2,378,992	\$2,213,027	\$2,010,928	\$2,277,784	\$2,369,934	-8.1%
<b>Non-Domestic Totals</b>	<b>\$4,831,211</b>	<b>\$ 7,423,494</b>	<b>\$7,600,060</b>	<b>\$4,771,581</b>	<b>\$7,318,236</b>	<b>\$8,034,385</b>	<b>-1.2%</b>

\* Dollars reported are not adjusted for inflation. \*\*In dollars using December 31 exchange rate for each year.

**APPENDIX 5: Diocesan Pledges and Income**

Diocese	Province	2013 Commitment Amount	Pledge % 2013	2012 Income per Diocesan Reports	2014 Commitment Amount	Pledge % 2014
Alabama	4	\$373,277	15.5%	\$2,561,929	\$367,372	15.0%
Alaska	8	\$83,400	19.0%	\$405,022	\$66,480	23.3%
Albany	2	\$117,238	11.5%	\$1,171,969	\$121,303	11.5%
Arizona	8	\$250,000	11.8%	\$2,301,182	\$260,000	11.9%
Arkansas	7	\$130,000	11.0%	\$1,337,989	\$136,796	11.2%
Atlanta	4	\$774,851	19.0%	\$4,267,090	\$787,947	19.0%
Bethlehem	3	\$73,630	5.7%	\$1,423,537	\$76,817	5.9%
California	8	\$677,048	19.0%	\$3,635,402	\$667,926	19.0%
Central Florida	4	\$56,600	2.8%	\$2,208,630	\$54,650	2.6%
Central Gulf Coast	4	\$107,983	9.5%	\$1,183,427	\$105,516	9.9%
Central New York	2	\$268,663	19.0%	\$1,520,487	\$266,093	19.0%
Central Pennsylvania	3	\$247,146	17.6%	\$1,249,652	\$241,657	21.4%
Chicago	5	\$500,004	17.1%	\$3,124,819	\$500,000	16.6%
Colombia	9	\$1,000	n/a	\$233,765	\$1,200	1.1%
Colorado	6	\$156,197	9.6%	\$1,392,099	\$174,845	13.7%
Connecticut	1	\$922,004	18.0%	\$4,955,657	\$822,062	17.0%
Convocation of Episcopal Churches in Europe	2	\$25,054	7.9%	\$251,386	\$26,260	20.0%
Dallas	7	Parishes only	0.0%	\$3,344,618	\$21,562	0.7%
Delaware	3	\$227,500	16.4%	\$1,366,549	\$227,500	18.3%
Dominican Republic	9	\$12,000	1.6%	\$881,078	\$12,000	1.6%
East Carolina	4	\$127,000	12.1%	\$1,281,928	\$150,000	12.9%
East Tennessee	4	\$296,812	19.4%	\$1,689,491	\$307,899	19.6%
Eastern Michigan	5	\$114,014	17.8%	\$769,206	\$115,154	17.7%
Eastern Oregon	8	\$69,419	20.6%	\$426,587	\$58,870	19.2%
Easton	3	\$104,894	19.0%	\$665,186	\$103,585	19.0%
Eau Claire	5	\$18,610	18.3%	\$259,098	\$20,700	14.9%
Ecuador Central	9	\$0	n/a	\$210,697	\$1,282	1.4%
Ecuador Litoral	9	\$1,600	2.0%	\$149,837	\$1,600	5.4%
El Camino Real	8	\$208,700	19.5%	\$1,261,163	\$216,821	19.0%
Florida	4	\$179,232	10.7%	\$1,774,621	\$188,642	11.4%
Fond du Lac	5	\$50,000	11.0%	\$538,901	\$42,474	10.1%
Fort Worth	7	\$74,495	19.0%	\$550,983	\$81,887	19.0%
Georgia	4	\$180,000	12.7%	\$1,439,907	\$180,000	13.6%
Haiti	2	\$5,000	n/a	\$62,161	\$10,000	n/a
Hawaii	8	\$318,500	19.0%	\$1,770,828	\$313,700	19.0%
Honduras	9	Will not pledge due to reduced grant	n/a	\$466,117	Will not pledge due to reduced grant	n/a
Idaho	8	\$83,774	19.0%	\$638,547	\$73,914	14.3%
Indianapolis	5	\$549,526	19.0%	\$3,064,417	\$559,439	19.0%
Iowa	6	\$187,610	19.0%	\$1,100,817	\$186,355	19.0%
Kansas	7	\$286,128	19.0%	\$1,668,368	\$294,180	19.0%
Kentucky	4	\$133,714	10.8%	\$1,204,020	\$140,923	13.0%

REPORTS TO THE 78<sup>TH</sup> GENERAL CONVENTION

Diocese	Province	2013 Commitment Amount	Pledge % 2013	2012 Income per Diocesan Reports	2014 Commitment Amount	Pledge % 2014
Lexington	4	\$185,713	19.0%	\$1,082,523	\$182,879	19.0%
Long Island	2	\$561,254	19.0%	\$2,893,717	\$527,006	19.0%
Los Angeles	8	\$740,350	19.1%	\$4,067,789	\$598,168	15.2%
Louisiana	4	\$152,540	14.9%	\$1,135,617	\$167,794	16.5%
Maine	1	\$359,741	19.0%	\$1,923,249	\$346,417	19.2%
Maryland	3	\$546,000	18.6%	\$3,243,353	\$546,000	17.5%
Massachusetts	1	\$949,646	18.3%	\$4,790,208	\$887,340	19.0%
Michigan	5	\$373,025	19.0%	\$2,099,550	\$376,115	19.0%
Milwaukee	5	\$248,927	19.0%	\$1,353,954	\$241,101	19.5%
Minnesota	6	\$382,751	19.0%	\$2,036,915	\$364,214	19.0%
Mississippi	4	\$277,621	10.4%	\$2,266,651	\$294,768	13.7%
Missouri	5	\$338,100	19.0%	\$1,907,954	\$339,700	19.0%
Montana	6	\$35,000	7.3%	\$610,246	\$35,000	7.1%
Navajoland	8	\$4,200	2.2%	\$69,945	\$3,600	n/a
Nebraska	6	\$110,659	19.0%	\$758,654	\$121,344	19.0%
Nevada	8	\$115,138	19.0%	\$735,440	\$115,447	18.8%
New Hampshire	1	\$255,200	19.0%	\$1,525,190	\$266,986	19.0%
New Jersey	2	\$317,507	10.0%	\$3,114,208	\$299,421	10.0%
New York	2	\$750,000	15.7%	\$5,315,604	\$832,000	16.0%
Newark	2	\$428,000	19.0%	\$2,417,453	\$436,500	19.0%
North Carolina	4	\$776,245	19.0%	\$4,341,602	\$802,105	19.0%
North Dakota	6	\$42,000	12.8%	\$452,401	\$42,000	12.6%
Northern California	8	\$336,000	16.8%	\$2,050,796	\$366,851	19.0%
Northern Indiana	5	\$69,395	11.4%	\$791,804	\$69,431	10.3%
Northern Michigan	5	\$47,071	19.0%	\$336,288	\$41,095	19.0%
Northwest Texas	7	\$100,153	11.2%	\$1,051,261	\$93,626	10.1%
Northwestern Pennsylvania	3	\$129,502	19.0%	\$850,740	\$138,841	19.0%
Ohio	5	\$487,725	19.0%	\$2,502,600	\$452,694	19.0%
Oklahoma	7	\$354,050	19.0%	\$1,854,577	\$329,570	19.0%
Olympia	8	\$612,514	19.1%	\$3,537,250	\$649,278	19.0%
Oregon	8	\$330,149	19.0%	\$1,873,517	\$341,421	19.5%
Pennsylvania	3	\$200,000	4.6%	\$4,803,461	\$225,000	4.8%
Pittsburgh	3	\$126,537	12.3%	\$1,466,586	\$150,000	11.1%
Puerto Rico	9	\$40,885	19.0%	\$388,104	\$50,940	19.0%
Quincy	5	\$4,200	n/a	\$87,132	n/a	n/a
Rhode Island	1	\$445,726	19.0%	\$2,396,585	\$432,551	19.0%
Rio Grande	7	\$50,000	4.4%	\$1,320,417	\$55,000	4.6%
Rochester	2	\$207,642	19.0%	\$2,300,584	\$218,024	10.0%

REPORTS TO THE 78<sup>TH</sup> GENERAL CONVENTION

Diocese	Province	2013 Commitment Amount	Pledge % 2013	2012 Income per Diocesan Reports	2014 Commitment Amount	Pledge % 2014
San Diego	8	\$220,000	12.1%	\$2,015,226	\$242,000	12.8%
San Joaquin	8	\$0	0.0%	\$246,770	\$5,000	3.9%
South Carolina	4	\$49,020	0.9%	\$378,000	\$49,020	19.0%
South Dakota	6	\$44,808	9.0%	\$648,542	\$77,981	14.8%
Southeast Florida	4	\$392,390	9.5%	\$3,374,773	\$390,556	12.0%
Southern Ohio	5	\$703,773	18.8%	\$3,439,275	\$630,662	19.0%
Southern Virginia	3	\$143,550	8.0%	\$1,823,212	\$153,500	9.0%
Southwest Florida	4	\$524,687	17.3%	\$3,004,645	\$508,082	17.6%
Southwestern Virginia	3	\$142,894	16.8%	\$900,068	\$148,213	19.0%
Spokane	8	\$160,371	19.0%	\$859,732	\$140,549	19.0%
Springfield	5	Not finalized	n/a	\$783,766	\$12,500	1.9%
Taiwan	8	\$1,000	0.1%	\$203,782	\$1,500	1.8%
Tennessee	4	\$107,731	7.0%	\$1,679,070	\$126,066	8.1%
Texas	7	\$463,959	6.7%	\$7,040,880	\$755,338	10.9%
Upper South Carolina	4	\$387,927	19.0%	\$2,097,834	\$375,788	19.0%
Utah	8	\$472,804	19.0%	\$2,295,121	\$413,273	19.0%
Venezuela	9	\$1,000	n/a	No report	No report	n/a
Vermont	1	\$149,068	15.1%	\$1,032,526	\$136,879	15.0%
Virgin Islands	2	\$46,116	19.0%	\$350,265	\$43,750	19.0%
Virginia	3	\$811,568	17.7%	\$4,444,078	\$827,709	19.1%
Washington	3	\$453,000	13.1%	\$3,644,516	\$448,584	12.7%
West Missouri	7	\$313,475	21.9%	\$1,720,528	\$311,141	19.4%
West Tennessee	4	\$133,060	9.2%	\$1,253,903	\$152,887	13.5%
West Texas	7	\$136,203	3.4%	\$4,279,276	\$144,098	3.5%
West Virginia	3	\$180,000	9.4%	\$1,815,639	\$189,000	11.1%
Western Kansas	7	\$13,768	16.7%	\$161,728	\$14,422	34.6%
Western Louisiana	7	\$64,239	6.6%	\$1,225,571	\$107,615	9.7%
Western Massachusetts	1	\$289,497	15.0%	\$2,187,486	\$310,122	15.0%
Western Michigan	5	\$140,904	17.3%	\$1,019,415	\$170,889	19.0%
Western New York	2	\$75,000	10.5%	\$831,511	\$83,384	11.7%
Western North Carolina	4	\$209,934	14.0%	\$1,553,683	\$186,442	13.0%
Wyoming	6	\$224,308	19.5%	\$1,223,085	\$209,586	19.0%

# PROPOSED RULES OF ORDER OF THE HOUSE OF BISHOPS

## **I. Services and Devotions**

- A. I**—As an indication of our humble dependence upon the Word and Spirit of God, and following the example of primitive Councils, a copy of the Holy Scriptures shall always be reverently placed in view at all meetings of this House.
- B. II**—On each day of the Session of the House, the meeting shall be opened with prayer and the reading of the Holy Scriptures.
- C. III**—At the hour of noon on each day of the Session, there shall be a devotional service, including prayers for the Church in its mission, as provided for in the Book of Common Prayer.
- D. IV**—The last session of the House shall be closed with the Benediction pronounced by the Bishop presiding.
- E. V**—At every session of the House of Bishops there shall be a daily celebration of the Holy Eucharist at such time and place as the Presiding Bishop or Vice-Chair of the House shall appoint.
- F. VI**—Preceding the balloting for the election of a Presiding Bishop, of a Missionary Bishop, or on the proposed transfer of a Missionary Bishop from one Diocese to another, there shall be a celebration of the Holy Eucharist, with a special prayer for the guidance of the Holy Spirit.
- G. VII**—The opening service of the General Convention and selection of the Preacher shall be in charge of the Presiding Bishop, the Vice-Chair of the House of Bishops, and the Bishop of the Diocese wherein the Convention is to be held. The sermon shall be delivered by the Presiding Bishop, unless the Presiding Bishop shall elect to appoint some other Bishop as Preacher.

## **II. First Day of Session**

- A. I**—The House of Bishops shall meet for business at such time and place as shall have been duly notified by the Presiding Bishop, or the Vice-Chair of the House, to the members of this House, and shall be called to order by the Presiding Bishop or the Vice-Chair, or, in their absence, by the Senior Bishop, *with jurisdiction*, present.
- B. II**—The House shall then proceed to elect a Secretary if the office is vacant; and the person elected shall serve until the end of that meeting of the Convention. At the end of each meeting of the Convention, the House shall proceed to elect a Secretary who shall continue in office until the conclusion of the triennial meeting of the Convention following that election. With the approval of the Presiding Officer, the Secretary may then, or later, appoint Assistant Secretaries.
- C. III**—The roll of members shall be called by the Secretary. On the second and third days the Secretary shall make a note of the late arrivals who shall inform the Secretary of their presence.
- D.** The minutes of the last meeting shall then be read by the Secretary and acted on by the House. Such reading may be dispensed with by a majority vote of the House.
- E. IV**—Bishops appearing in the House for the first time after their Consecration shall then, or at such other time at that meeting appointed by the Presiding Bishop, be presented to the President in a manner prescribed by the Presiding Bishop.

**F. V**—At a time deemed suitable, the Presiding Bishop shall then announce, without word or comment, the fact and the date of the death of any members who have died since the last preceding meeting; after which the House shall be led in prayer.

**G. VI**—The House shall then proceed to elect a Vice-Chair, if the office is then vacant, after hearing the report of the nominating committee of the House and after receiving any other nominations from the floor; and the person elected shall serve until the conclusion of *the next triennial meeting of the Convention* ~~that meeting~~. At the conclusion of each meeting of the Convention, the House, using the same procedure, shall proceed to elect a Vice-Chair who shall continue in office until the conclusion of the triennial meeting of the Convention following that election. The Vice-Chair, in the absence of the Presiding Bishop, or at the request of the Presiding Bishop, shall be the Presiding Officer of the House. In the absence of the Vice-Chair, the Presiding Bishop may ask another member of the House to preside.

### **III. Daily Orders**

**A. I**—The regular order of business of the House shall be as follows:

1. Devotions.
2. Roll call or late registrations.
3. Minutes of the previous meeting.
4. Presentation of new members.
5. Communications from the Presiding Bishop.
6. Report of the Committee on Dispatch of Business.
7. Petitions and Memorials.
8. Messages from the House of Deputies not yet disposed of.
9. Motions of Reference.
10. Reports of Legislative Committees in the order in which the Committees are named in General Rule I.
11. Reports of Special Committees.
12. Reports of Special Commissions.
13. Miscellaneous business.

**B. II**—At any Special Meeting of the House, the Secretary shall present the Official Call for such meeting and incorporate such Call in the Minutes. The order of business at any Special Session shall be as follows:

1. Call to order.
2. Devotions.
3. Roll call.
4. Presentation of new members.
5. Communications from the Presiding Bishop.
6. The special Business of the Meeting.
7. Reports of Special Committees.
8. Reading of the Minutes.
9. Adjournment.

**C. III**—On the second day of the Session, after Devotions, the Presiding Bishop shall lay before the House a statement of official acts during the recess of the General Convention.

**D. IV**—On the days when the House of Bishops is expected to meet with the House of Deputies and others in Joint Session, the first order of business shall be the consideration of such matters as the Committee on Dispatch of Business shall report as urgently demanding attention. Then shall follow consideration of Messages from the House of Deputies not disposed of, Reports from Standing Committees, and other business for which time shall remain. If the Joint Session shall adjourn before the customary hour for adjournment of the House of Bishops, the House shall resume its sitting. Any part of this rule may be suspended by a majority vote.

**E. V**—The Secretary shall keep a Calendar of Business, on which shall be placed, in the order in which they are presented, Reports of Committees, Resolutions which lie over, and other matters undisposed of, indicating the subject of each item.

**F. VI**—~~The Secretary shall also keep a Consent Calendar, which shall be published daily and distributed to the members before the convening of the House on each legislative day, and designate it as a separate calendar. Matters shall be listed on the Consent Calendar in separate groupings according to the date that they have been placed thereon. All matters to which amendments have been proposed by a Committee shall be so designated. No debate is in order regarding any matter appearing on the Consent Calendar. However, the President shall allow a reasonable time for questions from the floor and answers to those questions. No amendment other than an amendment contained in a Committee report is in order regarding any matter on the Consent Calendar. Any amendments contained in Committee reports on such matters shall be deemed adopted unless the matter is objected to and removed from the Consent Calendar. Immediately prior to a vote on the first matter on the Consent Calendar the President shall call to the attention of the members the fact that the next vote will be on the first matter pending on the Consent Calendar. Matters appearing on the Consent Calendar shall be taken up immediately following the noon recess of the next legislative day following their placement on the Consent Calendar, or otherwise by unanimous consent or by adoption of a special order of business. A matter may be placed on the Consent Calendar by report of a Legislative Committee, if the Committee vote to report the matter with a recommendation for adoption, with or without amendments, or for discharge, or for rejection was by three quarters (3/4) of the members present and if the Committee recommends placement of the matter on the Consent Calendar. Prior to a vote on final passage of any matter appearing on the Consent Calendar, it shall be removed from the Consent Calendar if (1) any three Bishops, or (2) the sponsor of the matter, or (3) the Committee on Dispatch of Business files with the Secretary written objections to the presence of the matter on the Consent Calendar. Any matter so removed may not be placed thereafter on the Consent Calendar but shall be restored to the Daily Calendar. Any matter removed from the Consent Calendar, to which amendments have been proposed by a Committee, shall stand on the Daily Calendar in its original, unamended form, and amendments shall be treated as if the matter had never been on the Consent Calendar.~~

*The secretary shall keep a Consent Calendar, which shall be published daily and distributed to the members before the convening of the House on each legislative day, and designate it as a separate calendar. Matters shall be listed on the Consent Calendar in separate groupings according to the date that they have been placed thereon. All matters to which amendments have been proposed by a Committee shall be so designated.*

*No debate is in order regarding any matter appearing on the Consent Calendar. However, the President shall allow a reasonable time for questions from the floor and answers to those questions.*

*No amendment other than an amendment contained in a Committee report is in order regarding any matter on the Consent Calendar. Any amendments contained in Committee reports on such matters shall be deemed adopted unless the matter is objected to and removed from the Consent Calendar.*

*Matters appearing on the Consent Calendar shall be taken up immediately following the noon recess of the next legislative day following their placement on the Consent Calendar, or otherwise by unanimous consent or by adoption of a special order of business.*

*A matter may be placed on the Consent Calendar by vote of a Legislative Committee, if the Committee's vote to report the matter with a recommendation for adoption (with or without amendments), or for discharge, or for rejection was by three quarters (3/4) of the members present.*

*Prior to a vote on final passage of any matter appearing on the Consent Calendar, it shall be removed from the Consent Calendar if (1) any three Bishops, or (2) the sponsor of the matter, or (3) the Committee on Dispatch of Business requests, in writing, that the Secretary remove the matter from the consent calendar. Any matter so removed may not be placed thereafter on the Consent Calendar but shall be restored to the Daily Calendar. Any matter removed from the Consent Calendar, to which amendments have been proposed by a Committee, shall stand on the Daily Calendar in its original, unamended form, and amendments shall be treated as if the matter had never been on the Consent Calendar.*

**G. VII**—The Order of the Day shall be taken up at the hour appointed, unless postponed by a two-thirds vote of those present and voting.

**H. VIII**—Bishops invited to honorary seats may be introduced by the Presiding Officer whenever no other business occupies the House.

**IV. Appointment of Committees**

**A.** Committees of this House shall be appointed by the Presiding Officer of the House unless otherwise ordered. The Presiding Bishop, not later than the third day of the session, shall name the members of all the Committees to serve on an annual basis, and shall designate the Chair of each Committee.

**B.** The following shall be the Committees of the House:

1. Standing Committees:
  - a. Dispatch of Business.
  - b. Certification of Minutes.
  - c. Rules of Order.
  - d. Privilege and Courtesy.
  - e. Resignation of Bishops.
  - f. Pastoral Letter.
2. Legislative Committees as needed:
  - a. Constitution and Canons.
  - b. Structure.
  - c. World Mission.
  - d. National and International Concerns.
  - e. Social and Urban Affairs.
  - f. Small Congregations.
  - g. Evangelism.
  - h. Prayer Book, Liturgy, and Church Music.
  - i. Ministry.
  - j. Education.
  - k. Church Pension Fund.
  - l. Stewardship and Development.
  - m. Ecumenical Relations.
  - n. Resignation and Deployment of Bishops.
3. Other Committees as needed:
  - a. Communications.
  - b. Miscellaneous Resolutions.
  - c. Religious Communities.
  - d. On Nominations and Elections.
  - e. Admission of New Dioceses.

**C.** The Chair of each Committee shall appoint a Vice-Chair and a secretary.

**D.** The Presiding Bishop may at any time refer to any Committee of the House, for its consideration, matters which arise and which should receive consideration at the next meeting of the House.

**V. General Rules for Meetings of This House**

~~I~~ Committees shall be appointed by the Presiding Officer of the House unless otherwise ordered. The Presiding Bishop shall name the members of all the Committees of this House annually, and shall designate the Chair of each Committee. The Chair shall appoint a Vice-Chair and a Secretary; and if the Chair should leave the Convention or the House of Bishops early, the Secretary of the House shall be notified. The



~~Presiding Bishop may refer to Committees of this House, for their consideration, matters which arise and which should receive consideration at the next meeting of the House. The Standing Committees, to be announced not later than the third day of the session, may be as follows:~~

- ~~1. Dispatch of Business.~~
- ~~2. Certification of Minutes.~~
- ~~3. Rules of Order, of which the Presiding Bishop shall be a member, *ex officio*.~~
- ~~4. Constitution.~~
- ~~5. Canons.~~
- ~~6. Structure.~~
- ~~7. Consecration of Bishops.~~
- ~~8. World Mission.~~
- ~~9. National and International Concerns.~~
- ~~10. Social and Urban Affairs.~~
- ~~11. Small Congregations.~~
- ~~12. Evangelism.~~
- ~~13. Prayer Book, Liturgy and Church Music.~~
- ~~14. Ministry.~~
- ~~15. Education.~~
- ~~16. Church Pension Fund.~~
- ~~17. Stewardship and Development.~~
- ~~18. Ecumenical Relations.~~
- ~~19. Communications.~~
- ~~20. Miscellaneous Resolutions.~~
- ~~21. Privilege and Courtesy.~~
- ~~22. Committees and Commissions.~~
  - ~~A. Pastoral Letter.~~
  - ~~B. Resignation of Bishops.~~
  - ~~C. Religious Communities.~~
  - ~~D. On Nominations and Elections.~~

~~In addition, the Presiding Bishop shall appoint a Legislative Committee on Admission of New Dioceses if such legislation will be presented to the Convention.~~

## **V. General Rules for Meetings of This House**

**A. II**—~~No Memorial, Petition, or Address shall come before this House unless presented by the Presiding Officer of the House, or some other Bishop present.~~

**B. III**—~~Nothing other than Reports and other documents printed for the use and by the order of the House, except the private correspondence of its members, shall be distributed in the House without having first been entrusted to the Secretary, and submitted to the approval of the Presiding Officer.~~

**C. IV**—~~All Resolutions shall be reduced to writing, and no motion shall be considered as before the House until seconded. In all cases where a Resolution seeks to amend a Canon or an entire Title of Canons, the form of Resolution submitted shall set out the enactment in the form prescribed by Canon V.1, shall include with a dash overstrike on each letter any words which are deleted by the amendment and shall underline any words which are added by the amendment; *Provided*, that if the amendment of an entire Title is to be covered by one enactment under Canon V.1.4, the deleted text and the underlining of the next text need not be included but the proponent shall make adequate written explanation of the changes.~~

~~All resolutions of Bishops shall be proposed by one Bishop and be endorsed by not less than two additional Bishops, all three being from different dioceses. Individual Bishops shall be limited to proposing not more than three resolutions.~~

**D. XIII–(a)** Reports of Committees shall be in writing, and shall be received in due course. Reports recommending or requiring any action or expression of opinion by the House shall be accompanied by specific Resolutions.

**(b)** At the conclusion of each meeting of a Committee, its Chair shall prepare, or cause to be prepared, in triplicate, on forms provided for the purpose, a separate report with regard to each matter upon which the Committee took final action during the meeting. Each such report shall be in the following alternative form:

1. Recommends adoption, with or without amendments, in which case the question shall be on the adoption of the Resolution, or the Resolution as amended.
2. Recommends rejection, with or without reasons, in which case the question shall be on the adoption of the Resolution, notwithstanding the recommendation of the Committee for rejection.
3. Recommends that it be discharged from further consideration of the Resolution because
  - i. the matter is not within the scope of the Committee’s function, in which case it may recommend referral to an appropriate Committee;
  - ii. the matter has already been dealt with by action of the House at this meeting of the General Convention; or
  - iii. the matter is covered by a Resolution of a prior General Convention; ~~or for other reasons.~~
  - iv. ~~for other reasons.~~
4. Recommends referral to a Standing Committee to study the theological, ethical and pastoral questions inherent in the subject or to develop recommendations and strategies on the subject which will be of concrete assistance to this Church or to study or make recommendations concerning the subject.
5. Recommends concurrence, with or without amendment, with House of Deputies Message.
6. Recommends non-concurrence with House of Deputies Message.

**(c)** Each report shall be dated, signed by the Chair or Secretary of the Committee, and transmitted to the office of the Secretary of the House, who shall endorse thereon the date of receipt thereof. If there is a minority position in the Committee and a minority spokesperson requests a minority report, the Chair shall include the same in the report.

Any resolution which involves an amendment to the Constitution or Canons shall be referred to the appropriate Legislative or Special Committee for action and simultaneously to the Committee on Constitution or the Committee on Canons, as the case may be, and such Committee shall make certain that the Resolution is in proper constitutional or canonical form, achieves consistency and clarity in the Constitution or Canons, and includes all amendments necessary to effect the proposed change, and shall promptly communicate its recommendations to the Legislative or Special Committee. In such case the Committee shall neither concern itself with, nor report on, the substance of the matter referred to it, but whenever requested to do so by the Presiding Officer of the House, the Committee shall in its report to the House make recommendations as to substance.

**(d)** Before final consideration, by the House, the Joint Standing Committee on Program, Budget, and Finance (PB&F) shall have been informed by the Committee considering any proposed action which, if adopted by General Convention, would require an appropriation of funds and PB&F shall have acknowledged receipt of such information by endorsement on the committee report or by other appropriate means. Implementation of any such resolution is subject to funding in the budget.

**E. XIV**–Reports of Committees appointed to sit during the recess, if not acted upon at once, shall, when presented, be made the Order of the Day for a time fixed. Printed Committee Reports which have been delivered to, and circulated among, the members of the House of Bishops, in advance of the making of such Reports upon the floor of the House, shall be presented by title and the Chair or Committee member presenting said Report shall be allowed five minutes for summarizing the same, which time may be extended only by a two-thirds vote of those present and voting.

**F. ~~XX~~**—All Resolutions which are to be communicated to the House of Deputies, unless they contain information of action incomplete in this House, or be temporarily withheld by order of this House at the time of their passage, shall be transmitted to the House of Deputies as soon as conveniently may be, under the direction of the Presiding Officer of the House.

**G. ~~XXI~~**—Committees from the House of Deputies shall be admitted immediately. Messages from the House of Deputies shall be handed by the Secretary of this House to the Presiding Officer, to be laid before the House as early as may be convenient. However, consideration of such Message shall be subject to a motion for the appointment of a Committee of Conference as hereinafter provided in these Rules. All such Messages communicating any legislative action on the part of the House of Deputies shall, without debate, be referred to the proper Committee, unless, without debate, the House shall decide to consider such Messages without such reference. When the consideration of such Message shall have been begun, it shall continue to be the Order of the Day until final action thereon.

The final action of this House upon any Message from the House of Deputies shall be by vote upon the question “Shall this House concur in the action of the House of Deputies as communicated in their Message No. \_\_\_\_\_?” Messages requiring no action by the House may be received by Title.

**H. ~~XXII~~**—If, during the consideration by this House of any action taken by the House of Deputies, a motion is made stating the position of this House and requesting a Committee of Conference, such motion shall have precedence and be put to a vote without debate, and if passed by a majority of the members of this House then present, a Committee of Conference shall be appointed. A Committee of Conference shall also be in order, with or without motion, (1) in cases where the House of Deputies has concurred, with amendments, in action taken by this House, or (2) in cases where this House has concurred, with amendments, in action taken by the House of Deputies. When a Committee of Conference has been appointed, final action upon the matter under consideration shall be deferred until the Committee of Conference shall have reported to this House; *Provided*, such report shall be made no later than the next business day or within one hour after the convening of the last meeting of this House in Convention assembled, whichever event shall first occur. Further, the Chair of any Standing or other Committee shall have full authority, either alone or with members of the Committee, to confer with the Chair of the cognate Committee of the House of Deputies.

**I. ~~XXIII~~**—Two Bishops may be appointed by the Presiding Officer to act with the Secretary in preparing daily reports of the action of this House, and furnishing them, at their discretion, to the public press.

**J. ~~XXVI~~**—The Committee on Privilege and Courtesy may recommend the courtesy of seat and voice to (1) any Bishop of a Church in the Anglican Communion who has been nominated by a Bishop of this House whose jurisdiction has entered into a formal companion diocese relationship approved by the Executive Council of this Church or (2) any Bishop who is a guest of the Presiding Bishop upon the nomination of the Presiding Bishop. The Committee on Privilege and Courtesy must receive nominations for the courtesy of seat and voice thirty days prior to the stated or called meeting of the House at which such courtesy is to be granted. The nominations for the courtesy of seat and voice shall be circulated in writing to the members of the House before the nominations shall be presented to the House. Bishops granted the courtesy of seat and voice shall be assigned a seat and shall have such seat and voice only for meeting of the House at which such courtesy was granted. Bishops granted courtesy of seat and voice shall at all times be entitled to be present except when the House is in Executive Session. At such a call, the Secretary shall ask the guests to leave the House.

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

**L. ~~XXVIII~~**—The Committee on the Bishop’s Pastoral shall be a ~~Standing Committee of the House~~, composed of persons eminently qualified for the task, and empowered to enlist additional assistance, with the consent of the Presiding Bishop, as may seem wise. The Committee shall make a Report at each Session of the House.

**M. Elections Of Bishops and Membership in the House**

(1) ~~VIII~~—When it is proposed to give consent to the consecration or confirmation of a Bishop-elect, or of a Bishop Coadjutor-elect, or of a Bishop Suffragan-elect, it shall be competent for any six voting members of the House to call for a vote by ballot.

(2) ~~IX~~—The Secretary shall prepare a ballot for each election listing alphabetically the names of all persons nominated. On each ballot, each voting member shall vote for the number of nominees to be or remaining to be elected, and any ballot with votes less than or in excess thereof shall be void. The nominees receiving the largest number of votes shall be deemed elected, provided that votes equal to or in excess of a majority of the ballots cast on any ballot shall be required for election.

(3) ~~XXIV~~—Any Bishop of a Church in the Anglican Communion who is in exile from a Diocese, or is without membership in a House of Bishops because the Diocese is temporarily in an extra-provincial status, and who is resident in any jurisdiction in this Church, or any other Bishop of a Church in the Anglican Communion who has resigned his or her position in that Church, who has made his or her primary residence in any jurisdiction in this Church may be admitted to this House as a collegial member. Such membership may be extended to such a Bishop by a two-thirds vote of those present and voting on each Bishop, taken by secret ballot if requested by at least six members of the House, considered by the members of the House present at any regularly called meeting, and shall continue until such time as the collegial member removes from the jurisdiction of this Church, or until such time as it is withdrawn by a like vote. Such collegial member shall be assigned a seat, and have a voice, in this House. No vote shall be accorded such collegial member, in keeping with the Constitution of this Church.

The Committee on Privilege and Courtesy must receive, one month in advance of any meeting of this House, nominations for collegial membership in this House, said nomination to be made only by the Bishop in whose jurisdiction the proposed collegial member resides. The nominations for collegial membership shall be circulated in writing to the members of the House before the nominations shall be presented to the House.

Any Bishop of an extra-provincial Diocese which originated in the Church or any Bishop of this Church who removed from the jurisdiction of this Church to the jurisdiction of a Church in the Anglican Communion may be continued in relationship to this House as an honorary member. Thirty days prior to each stated or called meeting of the House such honorary members shall give written notice of their intention to be present to the Presiding Officer of this House. Seat and voice shall then be accorded such honorary members, upon the nomination to the House by the Presiding Officer. No vote shall be accorded the honorary member.

Bishops admitted to honorary and collegial seats in the House shall at all times be entitled to be present except when the House is in Executive Session. At such a call, the Secretary shall ask the guests to leave the House.

(4) ~~XXV~~—Any Bishop of this Church who resigns a position for reasons other than those specified in Article I.2 of the Constitution, but whose resignation is not for reasons related to the Bishop’s moral character, may, on motion and by a majority vote, be accorded non-voting membership in the House. Until further contrary action by the House, any such non-voting member shall have the right to seat and voice at all meetings, the right to serve on committees, and all other rights of membership except that of voting on any matter.

**N. Debate and Decorum**

(1) ~~V~~—Members in discussion shall address the Chair, and shall confine themselves to the Question in debate. No member shall speak more than twice in the same debate without leave of the House. At the conclusion of any speech, the Presiding Officer alone, or any member of the House, may call for a vote, without debate, on a proposal for a recess of conference to define and clarify the issues of the debate and the way in which the House is working. If the proposal of a member is supported by at least four other members, it is to be put to a vote. If passed by a two-thirds vote of those present and voting, members of the House will form small

groups for a ten-minute conference, at the end of which debate will resume with any speakers who had already been recognized at the time of the motion for conference.

(2) ~~VI~~ Officers of the House of Bishops, when addressing the House in debate, shall in all cases do so from the floor of the House.

(3) ~~VII~~ When a division is called for, every voting member present shall be counted. When, in such procedure, the vote of the Presiding Officer produces a tie, the motion shall be considered as lost.

(4) On any question before the House the ayes and nays may be required by any six voting members, and shall in such cases be entered on the Journal.

(5) ~~X~~ When a Question is under consideration, the following motions shall have precedence in the order listed: to lay upon the table, to postpone to a time certain, to commit or to refer, to substitute another motion dealing with the same Question, to amend, or to postpone indefinitely; *Provided*, that, in consideration of a message from the House of Deputies, the provisions of Rules ~~XXI and XXII~~ V, G and H shall apply, and a motion made thereunder for a Committee of Conference shall have precedence; and *Provided, further*, that a proposal for a Recess of Conference shall always be in order, under the conditions set forth in Rule ~~V~~ N. (1).

(6) ~~XI~~ On motion duly put and carried, the House may resolve itself into a Committee of the Whole, at which no records shall be made of its action. On separate motion duly put and carried, those present at such sessions may be limited to members of the House.

(7) ~~XII~~ On motion duly put and carried, the House may go into Executive Session, at which only members of the House shall be present. The Chair of the Committee on Dispatch of Business shall act as clerk and make a record of all motions adopted.

(8) ~~XV~~ All questions of order shall be decided by the Chair without debate, but appeal may be taken from such decision. The decision of the Chair shall stand unless overruled by a two-thirds vote of those present and voting. On such appeal, no member shall speak more than once without express leave of the House.

(9) ~~XVI~~ Amendments shall be considered in the order in which they are moved. When a proposed amendment is under consideration, a motion to amend the same may be made. No after-amendment to such second amendment shall be in order, but a substitute for the whole matter may be received. No proposition on a subject differing from the one under consideration shall be received under color of a substitute.

(10) ~~XVII~~ A Question being once determined shall stand as the judgment of the House, and shall not be again drawn into debate during the same session of the House, except with the consent of a two-thirds vote of those present and voting. A motion to reconsider can be made only on the day the vote was taken, or on the next succeeding legislative day, and must be made and seconded by those who voted with the majority.

(11) ~~XVIII~~ (a) Except by a two-thirds vote of those present and voting, no new business shall be introduced for the consideration of the House after the second day of the Session. All matters originating in this House requiring concurrent action by both houses shall be considered before the last legislative day except for Resolutions of Privilege and Courtesy.

(b) No resolution proposing amendments to the Constitution or Canons of this Church may be presented in the House of Bishops for an initial vote on the last legislative day of General Convention; *Provided, however*, that any such resolution previously considered and voted upon by this House may be considered on the last legislative day in order to consider changes to the resolution approved by the House of Deputies.

(12) ~~XIX~~ Except by a two-thirds vote of those present and voting, no member of the House may introduce a Resolution at a special meeting unless the Resolution has been circulated thirty days in advance to the members. This rule shall not be construed in any way to prevent a Committee of the House from introducing Resolutions at special meetings.

**O. Rules of Order**

- (1) ~~XXIX~~ Additions and amendments to, or suspension or repeal of these rules shall require a two-thirds vote of those present and voting.
- (2) ~~XXX~~ These rules shall be in force in subsequent Sessions of this House unless otherwise ordered.
- (3) ~~XXXI~~ Except when in conflict with the Constitution or Canons, or any Rule herein contained, the latest edition of Robert's Rules of Order shall govern the interpretation of these rules, and the parliamentary procedures to be followed in this House.

**VI. The Presiding Bishop**

**A. I** On the day following the Joint Session to which the Joint Nominating Committee has reported pursuant to Canon I.2, the House of Bishops shall meet in executive session in a church to discuss the nominees presented at the Joint Session, and to elect a Presiding Bishop from among those nominees.

**B. II** ~~The House of Bishops should~~ *All members of the House of Bishops present shall remain within the confines of the church where the election has been held, until word has been received of the action of the House of Deputies.*

**VII. Missionary Bishops**

**A. I** ~~When a vacancy occurs or is about to occur in the Missionary Episcopate, it shall be the duty of the Presiding Bishop to investigate the situation existing in the Diocese, to consult with those persons in the field and at home best fitted to advise as to the conditions in the Diocese, and to submit to the members of the House such information as the Presiding Bishop may secure.~~

**B. II** ~~Before any vacancy in the Missionary Episcopate is to be considered or filled at any Meeting of the House, notice to this effect shall be given in the call of such Meeting. The ballot for the election to any such vacancy shall not, without unanimous consent, be taken at a Special Meeting until at least the first day, nor at a Meeting of the General Convention until at least the second day, after nominations have been made to the House. In the event of the occurrence of a vacancy in a Missionary Diocese, or the resignation of a Missionary Bishop, between the issuance of the call for a Special Meeting of the House of Bishops and the meeting thereof, the House, by a two-thirds vote of those present and voting, shall be competent to fill such vacancy, or to act upon such resignation.~~

**C. III** ~~Further proceedings for the election of a Missionary Bishop shall be as follows:~~

- 1. In the case of each vacancy to be filled, a special Joint Nominating Committee shall be appointed. The Committee shall be composed of three persons from the jurisdiction concerned, chosen by its Council of Advice or in some other manner as ordered by the Presiding Bishop, and three members of this House appointed by the Presiding Bishop. The Joint Nominating Committee shall elect its own officers and shall nominate three persons for the vacancy. Three weeks before the Meeting of the House these names shall be sent in confidence to each Bishop.
- 2. The Presiding Bishop may, in the exercise of discretion, make nominations for such vacancies.
- 3. At the Meeting of the House, the names of the persons proposed by the Joint Nominating Committee shall be formally placed in nomination, and opportunity shall also be given for nominations from the floor.
- 4. The Joint Nominating Committees and the Bishops making nominations, and other having knowledge of the persons nominated, shall give to the Committee on Domestic Missions or the Committee on Overseas Missions, as the case may be, full information regarding the nominees, and such Committee, having secured further information as may be possible, shall report to the House in Executive Session such further information concerning the intellectual, moral, and physical qualifications of the persons nominated, with dates of birth, graduation, and specific statements as to theological attainment,

proficiency in languages, and any specialty in sacred duties to which such persons may have devoted themselves. Questions may be asked and other information given by the Bishops.

5. All nominations for vacant Missionary Dioceses shall be made in Executive Session. The names of the nominees shall be made known to the public only after the election.
6. In the case of a declination, another election can be held from the same names without further formality than re-nomination; but if new names are introduced, the order prescribed above shall be repeated.
7. In the case of the proposed transfer of a Bishop in charge of a Missionary Diocese to another Diocese, action shall be as in the case of the election of Missionary Bishops.
8. All proceedings in Executive Session shall be held strictly confidential. In the case of elections held in Executive Session ~~and to be confirmed by the House of Deputies or by the Standing Committees of the Church~~, the names of those elected shall not be made known until they are published by the House of Deputies, ~~or until they are ordered to be sent to the Standing Committees for confirmation.~~

### **VIII. Standing Orders**

**A. I** ~~Whereas~~, by provisions of Canon III.11.6, and Canon III.11.9(c)(3)(iii), the Presiding Bishop is empowered to take order for the ordination and consecration of Diocesan and Missionary Bishops, either in the Presiding Bishop's own person or by commission issued to three Bishops; *It is hereby ordered*, that, ~~in all cases of Episcopal consecrations, the place for the same shall be designated only with the consent of the Ecclesiastical Authority in whose Diocese or Jurisdiction such proposed place is; that the Bishop-elect shall have the right to designate the Preacher and the two Bishops by whom the Bishop-elect is to be presented; and that, in the absence of the Presiding Bishop, the Senior Bishop by consecration who is present shall preside, unless some other Bishop shall have been designated by the Presiding Bishop.~~ *in all cases where the Presiding Bishop takes order for the ordination of a Bishop in a Diocese or Missionary Diocese, the place for the same shall be designated with the consent of the Ecclesiastical Authority in whose Diocese or Jurisdiction such proposed place is; the Bishop-elect shall have the right to designate the preacher and the two Bishops by whom the Bishop-elect is to be presented; and, in the absence of the Presiding Bishop, the Senior Bishop with jurisdiction by consecration who is present shall preside, unless some other Bishop shall have been designated by the Presiding Bishop.*

**B. II** Seniority among the Bishops is according to the date of the consecration of each Bishop.

**C. III** The House of Bishops shall assemble on every morning during the period of the General Convention, except the Lord's Day, for business, unless adjournment beyond that morning has been ordered by the vote of the House.

**D. IV** Two or more of the Bishops shall be appointed at each General Convention to take charge, together with the Secretary of the House of Bishops, of the Journal of its proceedings, and to see that the whole, or such parts of it as the House may direct, be entered in its proper place in the Journal of the General Convention.

**E. V** The Secretary of the House of Bishops shall keep a permanent record of the members and officers of the House from the beginning, and shall record therein the names of the Bishops who are or have been members of this House, the date and place of their consecration, the names of their consecrators, together with the date of the termination, by death, resignation, or otherwise, of the membership of such Bishops as have ceased to have seats in this House, all of which facts shall be recorded only upon official notification, for which it shall be the duty of the Secretary to call upon such persons as may be competent to furnish the same. The said record shall be the official Register of this House, and the roll of the House communicate the same to the House, as its official roll, as soon as the Presiding Officer shall have taken the chair. Such roll shall be subject to change only by vote of the House.

**F. VI**—In making up the list of the Bishops who have retained their constituted rights to seats in this House, the Secretary is instructed to leave the name of any Bishop resigned in the place which the Bishop occupies in the order of consecration, with the addition of the word “Bishop,” which shall be considered as the sufficient title of such resigned Bishop.

**G. VII**—In the event of the loss by any Bishop of a seat in the House of Bishops, with the consequent omission of the Bishop’s name from the roll, and a subsequent return to the House, the Bishop’s name shall be entered on the roll at the place corresponding with the time of such return.

**H. VIII**—At every meeting of the House of Bishops a seat for the Chair of the Committee on Dispatch of Business shall be assigned near the front of the House.

**I. IX**—At every meeting of the House of Bishops seats on the platform shall be assigned to such Bishops present as have formerly held the office of Presiding Bishop, and at every service of the General Convention such Bishops as have formerly held the office of Presiding Bishop shall be assigned places immediately in front of the Chaplain of the Presiding Bishop.

**J. X**—Whenever the House shall make a determination under Article I.2 of the Constitution that a resigned Bishop shall or shall not retain a seat and vote in the House, the following understanding of the intent of the pertinent terms of that provision of the Constitution shall apply:

**(a)** “advanced age” shall mean at least 62 years of age;

**(b)** “bodily infirmity” shall mean either a condition for which one is eligible for disability retirement benefits from the Church Pension Fund or Social Security Administration, or a physical or mental impairment that a physician or psychiatrist (approved by the Presiding Bishop) certifies would likely result in eligibility for such disability retirement benefits should the Bishop continue in active episcopal ministry;

**(c)** “office created by the General Convention” shall mean a ministry funded by the General Convention Budget and approved by the Presiding Bishop; and

**(d)** “mission strategy” shall mean a strategy that would allow the election of an indigenous member of the clergy of a non-domestic diocese as Bishop, or that would allow a diocese to implement a new mission strategy as determined by the Presiding Bishop, or that would allow a transition in episcopal leadership after a Diocesan Bishop or Bishop Suffragan has served 10 or more years in either or both of those offices.

### **IX. Standing Resolutions**

**A. I**—*Resolved*, That the Standing Committee on the Resignation of Bishops be requested to prepare a Resolution taking note of the service of each Bishop whose resignation is being accepted, such Resolution to be presented to the House of Bishops along with the recommendation on the resignation. Where a resignation is accepted between Meetings of the House, such Resolution shall be presented at the next Meeting.

**B. II**—*Resolved*, That the Presiding Bishop be requested to appoint, on each occasion, a Committee of three or more Bishops to prepare, on behalf of the House of Bishops, and send to the family of each Bishop who dies, a Memorial Message, such Committee to represent the House of Bishops at the funeral, where it is practical for them to attend.

**C. III**—*Resolved*, That, within six months after the adjournment of each General Convention, the Secretary of the House of Bishops shall communicate with the Bishop named as Convener of each Commission appointed during the preceding General Convention, and inquire whether the Commission has convened and organized, keeping a record of the replies received.



# PROPOSED RULES OF ORDER OF THE HOUSE OF DEPUTIES

## REPORT OF THE HOUSE OF DEPUTIES STUDY COMMITTEE ON THE RULES OF ORDER

The House of Deputies Study Committee on the Rules of Order was appointed by President Jennings following the 77th General Convention. Her goal in appointing the Committee was to undertake a comprehensive review and update to the Rules of Order that govern legislative business in the House of Deputies. During our work, she has encouraged us to think creatively about ways to improve the work of the House of Deputies.

Our Study Committee began its work by meeting with a parallel committee from the House of Bishops. During this meeting, we had a fruitful discussion and shared some of the experiences of our respective Houses and opportunities to improve the Joint Rules of Order.

Throughout its work, the House of Deputies Study Committee approached its task with two goals in mind. The first goal was to revise the rules of order in a way that makes them clearer, easier to understand, and a better resource for deputies who are trying to locate a particular rule. The second goal was to evaluate ways to improve the rules to facilitate the work of the House of Deputies and the General Convention.

### Style Revisions

To accomplish the first goal, the Study Committee adopted a plain-language philosophy. We revised text to be clear and direct and adopted an outline format to make it easier to follow and locate key rules. We modified words to remove obscure and arcane terms in favor of words that describe exactly what action is being taken. This approach will facilitate new deputies' understanding of the rules and encourage them to participate in the process more quickly. Rather than trying to understand what is happening or what a particular motion does or means, deputies should be able to quickly pick up on what is occurring as it happens.

A good example of how language can serve as a barrier to participation is the "Motion for the Previous Question," also known as "Call the Question." This motion ends the debate on any particular resolution or motion being considered and proceeds to an immediate vote. But outside its use in a parliamentary procedure, the phrase is almost never used. For a deputy who does not regularly participate in legislative session, this rule is one of many that are written in a way that increases the learning curve and serves as a barrier to their full participation in the legislative process. The desire to avoid these situations is reflected throughout these revised rules.

Another example is the action to "Discharge." There is significant ambiguity in what the motion to discharge means and what it is accomplishing. Often the House seeks to remove a resolution from further consideration without taking an up or down vote on it. In essence, the House is taking no action on a particular resolution and could be doing so for a number of reasons. To improve the transparency and the clarity of what is happening, the Committee is proposing that the act of discharging is renamed "Take No Further Action."

### Substantive Revisions

Our Study Committee also sought ways to improve the efficiency of the House. General Convention currently deals with hundreds of resolutions in a short amount of time, and now there is increased pressure to reduce the number of days and length of the General Convention. We were mindful of these financial and time pressures and calls by some to either limit or restrict the number of resolutions. We also felt that any mechanisms to improve efficiency should not come at a cost of the ability of a deputy have their idea heard by a committee, and considered and debated by the House.

The beauty of the General Convention is that, at its core, it allows for deputies to contribute to the conversation in a substantive way. If that participation is restricted too much, we are at risk in changing the culture and limiting the ability of ideas to percolate.

With these tensions in mind, we are proposing changes that should improve the flow of the legislative process, improve the debate experience, and allow for substantive discussion on the major issues that require it. What follows are some of the major changes:

#### *Revising the Role of Dispatch*

First, we are proposing to alter the role of the Committee on Dispatch of Business (Dispatch). Currently, the legislative calendar is set automatically and almost exclusively based on the time the resolutions are submitted to the House from Dispatch. They are then taken in order, without regard to which may be higher priority or require more consideration. We felt that there should be a better, more efficient way to handle legislative calendaring, and we sought to examine the role of Dispatch in this context.

Dispatch is a unique committee because it is the only committee that has members serving on all the other legislative committees and observing the debate, testimony, and conversation that is happening in all the committees. This, in essence, provides every legislative committee an advocate for any discussions regarding the calendar.

Our Study Committee's proposal is to give Dispatch the ability to be more intentional about the legislative calendar. We propose that on each day of General Convention, Dispatch will set the legislative calendar for the following day. Resolutions will be assigned an order on the calendar to ensure that high-priority resolutions can be addressed as needed. Following the end of the legislative day, Dispatch will review the House's progress on its work and rework the calendar to reflect new resolutions that have come out of legislative committees.

Once a resolution is on the calendar, it remains, ensuring that everything is scheduled for a debate. The Committee also ensured that the House always has a failsafe in the event that it feels that a resolution needs to be brought to the floor more quickly.

#### *Debate Rules*

Our Study Committee also sought to improve the debate experience for deputies at General Convention. As each convention progresses, concerns emerge about whether or not deputies will have enough time to have a substantive discussion on major resolutions. We felt that it was important to foster discussion and deliberation on resolutions, while also including some limits.

With this in mind, we have proposed the following changes to debate:

- Each speaker will be limited to two minutes. This time limit has become the norm at General Conventions in recent memory, and the House has continued to adopt this time limit;
- During the first six minutes of debate, no amendments will be in order, unless no one wishes to speak on the resolution. This provides an opportunity for at least three speakers to address the substance of a resolution before the debate shifts to whether or not the House wishes to amend the resolution. This will provide space for deputies to consider the resolution's overall merits;
- If three speakers rise to speak on one side of the issue, and no one rises to speak on the other side or to amend, the president may call for a vote. This ensures that those in support of a resolution have an opportunity to be heard, while ensuring that there is enough time to consider all resolutions that the House needs to consider; and
- Motions to End Debate (formerly known as Previous Question) have been limited to any one item. This removes a commonly expressed frustration by which there are multiple motions pending, and a person makes a motion to end debate on all motions at once. This can often create frustration, since deputies

may wish to end debate on an amendment and return to the resolution. When debate is cut off on all items, deputies have expressed frustration that they can't fully engage in considering a resolution. There is an overall 30-minute time limit on debate on any one resolution, which ensures that debate cannot continue forever.

#### *Other Changes*

We have also proposed other changes of a less substantive manner, including:

1. Updating the motion list to serve both as a list of motions and a description of the purpose of the motions;
2. Clarifying the election and voting process;
3. Clarifying what options a legislative committee has to dispose a resolution; and
4. Adding provisions to address the roles of a parliamentarian and sergeant-at-arms in the work of the House.

#### **Release of Draft and Opportunity for Comment**

The Committee published a preliminary report in December of 2014, and circulated a draft of the Rules to members of the House of Deputies. Deputies were provided an opportunity to respond to the Rules to provide comments or feedback on the proposed changes. The release of the Rules and the survey also prompted a vibrant discussion in many circles, and still other deputies emailed the members of the Committee directly with specific commentary or feedback. The Committee collected this feedback, reviewed each comment that it received, and considered whether or not to modify the proposed rules accordingly.

Given the extensive feedback, it is not possible to respond to each comment. Comments were generally positive, with deputies encouraged by the goals and approach of the Committee. A number of deputies identified missing pieces that were inadvertently left out by the Committee, or which needed to be flushed out. Others identified typographical errors that needed to be corrected.

As a result of the feedback, some minor changes in response to the feedback include:

- changing the terminology of what was initially “take no action” to “take no further action;”
- adding a provision that allows for additional time for deputies who require translation;
- clarifying that a vote on the Consent Calendar is a vote to take the action recommended by the Committee; and
- returning a provision encouraging the President to appoint deputies from each province to each committee.

There were also two major changes that resulted a significant amount of discussion on the various channels the Committee monitored, and in the survey results:

#### *I. Consent Calendar Changes*

In its proposal the Committee made changes to encourage better use of the Consent Calendar by legislative committees and deputies. The Consent Calendar is a tool that allows multiple pieces of legislation on which the House of Deputies has consensus to be adopted in a single vote. Legislative committees review, revise, and propose amendments; and recommend the action that the House takes on resolutions. For most resolutions, but not all, the House accepts the recommendation of legislative committees.

In past years, legislative committees have been urged to use the Consent Calendar to improve the legislative flow. Committees are asked to place non-controversial legislation on the calendar so that there is enough time to consider items that require deliberation or debate. After reviewing the use of the Consent Calendar, we felt that it was important to find ways to encourage its use.

The Study Committee proposed a small shift in the use of the Consent Calendar. In this proposal, a legislative committee's recommendation on a resolution — including all amendments — would be placed on the Consent Calendar automatically, unless the legislative committee votes otherwise. This will encourage legislative committees to engage in a substantive discussion on whether a resolution needs debate on the floor of the House.

The Rules of Order committee also wanted to maintain the rights of a proposer, or of any three deputies, to remove an item from the Consent Calendar at any time before the final vote on the calendar. The President, or the Chair of Dispatch, may also remove items that they think require more debate or discussion. This provides a safety valve so that, in the event that a resolution has opposition or merits debate, there will be an opportunity for the House to consider it.

These proposed changes generated a significant amount of conversation — both skeptical and supportive. On the skeptical side, some deputies felt that the move toward an automatic consent-calendar process would encourage too many resolutions on the Consent Calendar — resulting in some resolutions getting pushed through without due consideration by the deputies.

The Committee, however, felt that providing a 24-hour notice before the Consent Calendar can be acted upon provides a significant amount of time for deputies to review the calendar items in advance. This time period, coupled with liberal provisions to remove an item from the Consent Calendar, creates a process by which, if a deputy had a concern or felt that a committee's recommendation was off base, the deputy could easily talk with members of their deputation or with other deputies to get an item removed from the calendar and placed on the floor for full debate and consideration.

This process can happen at any point up to the final vote on the calendar, allowing even for last-minute removal of the item. There is also a clear process in place by which, if an item is removed from the Consent Calendar, it is automatically placed on the Daily Calendar, which is maintained by Dispatch.

Further, the Study Committee felt that it was important for Legislative Committees to take an active role and make a decision on which items should be considered on the floor with a full debate. If a committee's view on what items should be placed on the Consent Calendar is misplaced, the rest of the House has the right and opportunity to ensure that the item receives the treatment that the House sees best.

## *II. Motions for Reconsideration*

The other change that encouraged a significant amount of discussion was the Motion for Reconsideration. The Motion for Reconsideration is used during General Convention to consider something already acted upon by the House at Convention. Under the previous rules, the Motion was required to be brought by a member of the prevailing side and could only be brought in a limited amount of time. The Committee's proposed rule dispenses with both of these requirements and leaves it much like any other motion — the motion may be brought by any deputy and at any time until the Convention finally adjourns.

The Committee's approach is the preference of two other parliamentary authorities. First is the *Standard Code of Parliamentary Procedure*, the leading alternative to *Robert's Rules of Order* in voluntary organizations. The other is *Mason's Manual of Legislative Procedures*, which is the primary parliamentary authority in most U.S. state legislatures. Both of these authorities oppose *Robert's*, and favor the approach adopted by the Committee.

In making this decision, the Committee reflected on a few items. First, the House of Deputies operates in a bicameral system. This is in contrast to the presumption in *Robert's*, which typically anticipates a single body. A bicameral system requires ongoing dialogue between the two equal houses of the Convention to create a final resolution. Neither the bishops nor the deputies have the final say on any resolution, and a final vote of

the deputies is not an Act of the General Convention until the bishops also act on the same resolution. This bicameral system requires that the deputies have the flexibility to engage in conversation with the bishops.

For example, the House of Deputies may need to vote upon a resolution again to send to the bishops before a similar, but different, resolution is returned from the bishops. Providing a time limit, and a requirement that only the prevailing party is entitled to reconsider an item, unnecessarily restricts the House.

Second, the General Convention meets only once every three years — in contrast to most conventions anticipated by *Robert's* — which may meet annually, or even quarterly. It was the Committee's feeling that given the substantial time period between General Conventions, it was important that the House had an opportunity to express its final position on a matter before the Convention adjourns sine die. The House always has a right to revisit a decision at a subsequent General Convention, and the proposed rule follows this approach. This concern is also echoed in *Mason's*, which emphasizes that a legislative body has a fundamental right to revisit its decisions.

Third, the Committee evaluated the proposed limitations with the overall goals of the rewrite of the rules. Anytime a rule deviates or varies from the standard structure, a layer of complication is added. The goal of the Rules is not to frustrate the will of the House of Deputies, but to facilitate its final discernment on the issue before the Convention ends. This motion is rarely made, and in a body of more than 800 people, it is easy to locate an individual who may be willing to make the motion.

The process of identifying how the deputy voted also can be time-consuming, especially if the deputy is unaware of the requirement. The process also requires a deputy to reveal their vote to the entire assembly, and there is no verification procedure. Finally, rather than being accessible by all deputies, the procedural hurdles favor deputies with more familiarity with how to get this motion before the House. The Committee felt that these hurdles added more complications than whatever abuse they purported to prevent.

Given these concerns, the Committee felt it was best to keep the simpler, more flexible rule. In the event that the rule is actually abused, the House has tools to limit or stop the abuse, such as ending debate or suspending the rules.

### **Final Thoughts and Next Steps**

The House of Deputies is a democratic body. These Rules are your rules. If you choose to adopt them at this General Convention, they will guide and govern our deliberations. They will serve as a common understanding of how we will discern the future of The Episcopal Church. The work this Study Committee has undertaken is intense. Every member has gone above and beyond in contributing to this work, both in person and in numerous long conference calls. Without the committee members' work, this draft would not be before you today, and I am grateful for their hard work and dedication to this task.

Following our submission, these rules will be passed to the House of Deputies Committee on Rules of Order. The Rules of Order Committee will undertake deliberations on these rules and will likely schedule hearings before the first legislative day. The Study Committee anticipates that following these hearings, these Rules will be one of the first items of business to be considered by the House.

We hope that you will find them a valuable proposal, and we look forward to your deliberations on these Rules and on other important matters.

Peace,

Bryan W. Krislock, Esq.

*Chair, House of Deputies Study Committee on the Rules of Order*

## Members of the Committee

The Rev. Canon Dr. Michael Barlowe  
 The Rev. Gay Clark Jennings  
 Ms. Sally A. Johnson, Esq.  
 Mr. Thomas A. Little, Esq.  
 The Hon. Byron Rushing  
 The Rev. Dr. James B. Simons

## PROPOSED RESOLUTION

A152: ADOPT HOUSE OF DEPUTIES PROPOSED RULES OF ORDER

*Resolved*, That pursuant to Canon I.1.2, the House of Deputies hereby repeals its existing Rules of Order and adopts the attached Rules of Order, which are to remain in force until amended or repealed by the House.

### I. Holy Scripture and Prayers

#### A. Placement of Holy Scripture

1. The President and Secretary will ensure that a copy of the Holy Scriptures is reverently displayed at all meetings of the House of Deputies.

#### B. Daily Prayers

1. The daily session of the House will begin with prayers.
2. The President may call for prayers at other times.
3. Any Deputy may ask the President to call for prayer at other times.

### II. General Rules

#### A. Duty of Deputies

1. Deputies will prepare for and give their attention to the business of the House.
2. Deputies will attend all sessions of the House unless excused by the President.

#### B. Communication Devices

1. The President may allow Deputies to bring cell phones, computers, and other communication devices to the House, except as provided in these rules during closed sessions.
2. No talking on communications devices is allowed while the House is in session.
3. All communications devices will be set to the silent mode.
4. Deputies will respect those around them as they use such devices.

#### C. Distribution of Printed, Digital, and Other Materials

1. Only official reports, papers, and documents necessary for the business of the House may be distributed to the House, except with the approval of:
  - i. the President; or
  - ii. the House by a majority vote.
2. These rules apply to physical materials on the floor and digital materials distributed through official legislative software or devices.

#### D. Quorum

1. To transact business the Constitution, Article I Sec. 4, requires that:
  - i. A majority of the Dioceses entitled to representation in this House must have at least one clerical Deputy present; and
  - ii. A majority of the Dioceses entitled to representation in this House must have at least one lay Deputy present.

#### E. Minutes

1. The Minutes of the House will be kept by the Secretary or Assistant Secretaries and reviewed by the Committee on the Certification of Minutes.

2. The Committee on the Certification of Minutes will review, approve, and publish the final minutes for each day before the start of the next day's session.
3. The Committee on the Certification of Minutes will report its action at the next scheduled session.
4. The House may require that the Minutes for any session be approved by the House.

### **III. Deputations**

#### **A. Chair of Deputation**

1. At least one year before the first legislative session of the General Convention, each Deputation will:
  - i. designate a Chair; and
  - ii. notify the Secretary of the House of Deputies the name of the Chair.
2. The Deputation Chair will:
  - i. serve as the primary contact for House of Deputies communications;
  - ii. certify the Deputation's vote by orders;
  - iii. certify changes in the Deputation during General Convention;
  - iv. perform other duties as directed by the President.

#### **B. Certification of Alternate Deputies as Deputies**

1. Alternate Deputies may not sit or vote with their Deputations, unless and until certified by the Committee on Credentials as a substitute for a Deputy.
2. The Committee on Credentials will certify Alternate Deputies as Deputies before each session.
3. The procedures for certification will be those determined by the Secretary of the House of Deputies.
4. An Alternate Deputy will serve as Deputy only until the Deputy they replace is able to resume their seats.
5. The Committee on Credentials will hear any disputes on certification of Deputies and will report their decision to the House.

### **IV. Floor Privileges and Arrangements**

#### **A. Floor Privileges.** No one will be admitted to the floor except members, officers of the House, and:

1. the Secretary of the House of Deputies;
2. the Treasurer of the General Convention;
3. other persons authorized by the President or Secretary, to assist in the conduct of the business of the House;
4. other persons invited or authorized by the President.

#### **B. Seat and Voice.** The following will have seat and voice on the floor of the House:

1. two ordained persons and two lay persons who are duly authorized representatives of the Episcopal Church in Liberia;
2. members of the Official Youth Presence;
3. other persons authorized by the Joint Rules, the Constitution, or Canons.

#### **C. Platform.** Only officers of the House of Deputies, designated members of the Committee on Dispatch of Business, and other persons authorized or invited by the President may be on the platform of the House.

#### **D. Placement of Deputations and Others.** Deputations will be seated together on the floor of the House in random order, except that:

1. Deputations with members serving on the platform may be seated near the platform;
2. Deputations requiring language interpretation or with other needs may be seated in proximity to one another; and
3. The President may seat deputations and others as necessary to assist in the business of the House.

#### **E. Seating Adjacent to the Floor**

1. The President and the Secretary will designate a visitor's gallery.
2. The President and Secretary may designate areas adjacent to the floor of the House of Deputies as seating for Alternate Deputies, members of Executive Council, and others.

**F. Revocation of Floor Privileges**

1. Any person, including members and officers, may be excluded for good cause from the floor of the House by a two-thirds vote.
2. Any motion to exclude must specify the length of time, up to the final adjournment, that the member is excluded from the Floor.
3. The motion may provide that the person discontinues serving as a member of a committee during the person's exclusion from the Floor.

**V. Officers**

**A. President.** The President of the House of Deputies will be elected in accordance with the Canons.

1. The President will preside over all meetings of the House, unless the President relinquishes the Chair for a temporary period.
2. If the President relinquishes the Chair:
  - i. The Vice-President will preside; or
  - ii. If the Vice-President is unable or unwilling to Preside, the President may appoint any Deputy to preside.
3. If the President has relinquished the Chair, the President may resume the Chair at any time.

**B. Vice-President.** The Vice-President of the House of Deputies will be elected in accordance with the Canons.

1. The Vice-President will preside over all meetings of the House in the absence of the President.
2. If the Vice-President is presiding and wishes to relinquish the Chair, the Vice-President may appoint any deputy to preside.

**C. Secretary and Assistant Secretaries.**

1. The Secretary of the House of Deputies will be elected in accordance with the Canons.
2. The Secretary may appoint Assistant Secretaries.

**D. Parliamentarian**

1. The President may appoint one or more Parliamentarians and Vice-Parliamentarians to advise the President or presiding officer on parliamentary procedure.
2. A Parliamentarian may be a member of the House or another person at the discretion of the President.
3. The Parliamentarian may address the House or any committee of the House at the direction of the President or presiding officer to facilitate the business of the House.

**E. Chaplain**

1. The President may appoint one or more Chaplains to the House, who may, but need not be, members of the House. The President will specify the duties of the Chaplain.

**F. Sergeant-at-Arms**

1. The President may appoint a Sergeant-at-Arms and necessary assistants.
2. The Sergeant-at-Arms and assistants may be members of the House or other persons at the discretion of the President.
3. The President will specify the duties of the Sergeant-at-Arms. Duties may include:
  - i. locating chairs of legislative committees and escorting them to the platform;
  - ii. escorting distinguished visitors and performing ceremonial duties;
  - iii. maintaining order and decorum in the House;
  - iv. ensuring that only authorized persons are seated on the floor during sessions of the House except when there is a Joint Session of both Houses; and
  - v. ensuring that only authorized persons are present during Closed Sessions.



## **VI. Regular Session Schedule**

### **A. Regular Order of Business**

1. The Order of Business of each session of the House will be as follows, unless modified by the House in the schedule adopted by the House:
  - i. Opening Prayer
  - ii. Report of the Certification of the Minutes
  - iii. Communications from the President
  - iv. Report of Dispatch of Business
  - v. Report on Elections
  - vi. Committee Reports and Legislation
2. Order of Committee Reports. The Order of Legislation and Committee Reports will be determined as follows:
  - i. The Committee on Dispatch will adopt and publish a daily legislative calendar the day before each legislative session;
  - ii. During the time allotted for daily Committee Reports and Legislation, resolutions will be considered in the order on the published calendar.
  - iii. Following the adjournment for the day, the Committee on Dispatch will update the calendar for the subsequent day and will modify the order of Committee Reports as necessary to consider high priority legislation.
  - iv. Once legislation is added to the Legislative Calendar, the legislation will remain on the Calendar unless removed or acted upon by the House.

### **B. Special Order of Business**

1. Priority over regular business. If the House adopts a Special Order of Business, it will have priority over any other item of business, including any pending motions, reports, or resolutions.
2. Vote. A Special Order of Business requires a two-thirds vote to be adopted or amended.
3. Special Consideration of Business. The President, at any time no other Matter is being considered, may present any Matter to the House for its immediate consideration and action.

### **C. Consent Calendar**

1. Business placed upon the Consent Calendar. A Consent Calendar will be maintained by the Secretary and voted upon once a day as the first legislative order of the day.
2. Publishing the Consent Calendar.
  - i. The Consent Calendar must be published at least 24 hours before the beginning of the session at which the calendar is to be voted upon.
  - ii. The Consent Calendar must be posted by the Secretary either:
    - a) online; or
    - b) at a preannounced place and distributed to the Deputies.
3. Placing items on the Consent Calendar. Every Committee Reports on Resolutions or Memorials will be placed on the Consent Calendar automatically unless:
  - i. it is removed in accordance with these Rules;
  - ii. the Rules of Order, the Joint Rules of Order, the Canons, or the Constitution require a different procedure for considering the item;
  - iii. the item has been set by a Special Order of Business; or
  - iv. the item is one of the following:
    - a) a report from the Joint Standing Committee on Program, Budget and Finance;
    - b) an election;
    - c) a resolution of privilege or courtesy;
    - d) the confirmation of the election of the Presiding Bishop.

4. Removing items from the Consent Calendar. An item may be removed from the Consent Calendar any time before the final vote on the Calendar by:
  - i. the Legislative Committee proposing the action;
  - ii. the Chair of the Committee on Dispatch of Business;
  - iii. the proposer of the Resolution or Memorial;
  - iv. any three deputies;
  - v. the President of the House of Deputies.
5. Voting on the Consent Calendar. When voting on the Consent Calendar, the House will vote on all items at once. A majority vote is required to adopt the calendar.
  - i. Affirmative Vote. A vote to adopt the Consent Calendar is a vote to take the action of the Committee recommendation for all items on the Consent Calendar.
  - ii. A negative vote. If the House rejects the Consent Calendar, all items on the Consent Calendar will be placed on the Calendar of Business by the Committee on Dispatch.

## **VII. Resolutions and Memorials**

A. Resolutions. Resolutions are matters by which the House or the General Convention speaks to a particular subject or matter, amends the Constitution or Canons, or expresses the mind of the House.

B. Memorials

1. Memorials are statements about matters of great importance that urge General Convention to take action on a particular topic.
2. Memorials are referred to a legislative committee to inform the committee's work and deliberation.
3. A committee may propose a resolution in response to a memorial.

C. Form. A Resolution or Memorial will take the form prescribed by the Secretary.

D. Proposing. A Resolution or Memorial may be proposed by:

1. a Deputy, if:
  - i. three other Deputies endorse the resolution; and
  - ii. the Deputy proposes no more than three resolutions.
2. the President of the House of Deputies;
3. a House of Deputies Committee;
4. a Message from the House of Bishops;
5. a Diocese;
6. a Province;
7. a Standing Commission, Task Force, or body required to report to the General Convention; or
8. the Executive Council.

E. Submission Deadline. No Resolution or Memorial may be submitted to the House after the end of the second legislative day, unless it is:

1. a resolution of privilege or courtesy;
2. proposed by a House of Deputies Committee;
3. proposed by the President of the House of Deputies;
4. a Message from the House of Bishops; or
5. voted on by the House to consider it.

## **VIII. Legislative Committees**

A. General Rules on Legislative Committees

1. Appointment and Creation
  - i. No later than 90 days before the first legislative day of General Convention, the President will appoint Legislative Committees for the work of the House of Deputies at General Convention.
  - ii. The Legislative Committees may include the following and any others that the President designates:

- a) Rules of Order. Reviews and proposes Resolutions to revise the rules that govern the House.
  - b) Constitution & Canons. Receives and proposes Resolutions that propose amendments to the Constitution or Canons.
  - c) Governance & Structure. Receives and proposes Resolutions that address the governance and structure of this Church including General Convention, Executive Council, and the Anglican Communion.
  - d) World Mission. Receives and proposes Resolutions on mission personnel, world mission strategy, and covenant relationships with other Anglican Provinces or bodies.
  - e) Social Justice & International Policy. Receives and proposes Resolutions on social justice issues in The Episcopal Church's extra-U.S. dioceses and the international peace and justice work of this Church, including engagement with the Anglican Communion.
  - f) Social Justice & United States Policy. Receives and proposes Resolutions on social justice issues facing the United States, including its international engagement.
  - g) Congregational Vitality. Receives and proposes Resolutions on the health, development, and redevelopment of congregations and faith communities, including church planting, college and university communities, and new and non-traditional contexts.
  - h) Evangelism & Communications. Receives and proposes Resolutions on evangelism within this Church's jurisdictions; receives and proposes resolutions on communication strategies and technologies to strengthen the Church's communication of the Gospel and opportunities for information management and exchange within the Church.
  - i) Prayer Book, Liturgy & Music. Receives and proposes Resolutions on the Book of Common Prayer, liturgy, and music of this Church.
  - j) Formation & Education for Ministry. Receives and proposes Resolutions on Christian formation and education for all the baptized, and all matters related to ordained ministry.
  - k) Church Pension Fund. Receives and proposes Resolutions on the purpose, scope, structure, and work of the Church Pension Fund including, but not limited to, pensions, disability, health insurance, other insurance and products for lay and ordained employees of the Church, insurance for Church institutions, and publishing.
  - l) Stewardship & Development. Receives and proposes Resolutions on stewardship, stewardship education, development, and planned giving.
  - m) Ecumenical & Interreligious Relations. Receives and proposes Resolutions on relations between this Church and other Churches, this Church and other religions, interchurch cooperation and unity, and interreligious dialogue and action.
  - n) Environmental Stewardship & Care of Creation. Receives and proposes Resolutions on environmental stewardship and the care of creation.
  - o) Confirmation of the Presiding Bishop. Receives the Report from the House of Bishops regarding the election of a Presiding Bishop, and recommends action regarding confirmation.
- iii. Special Legislative Committees. The President will appoint the following committees for the work of the House of Deputies at General Convention no later than 90 days before the first legislative day of General Convention. These committees are not required to hold hearings under these Rules before taking any action.
- a) Dispatch of Business. Proposes the agenda for the House, determines the Calendar of the Day, proposes Special Orders of Business, and schedules elections.
  - b) Certification of Minutes. Reviews the minutes of the previous legislative day, corrects the minutes, and reports on their completion to the House.
  - c) Privilege & Courtesy. Receives and proposes Resolutions that commend individuals or organizations, and proposes Resolutions that express the House's appreciation for groups or persons.
  - d) Credentials. Registers Deputies and reports on the number of voting members in the House of Deputies at each session and acts as tellers for elections.

2. Membership and Composition
  - i. The President will determine the size of each Legislative Committee and appoint the members.
  - ii. All members of Legislative Committees must be Deputies.
  - iii. The President will be a member of all Legislative Committees, *ex officio*.
  - iv. The President will seek to balance the committee members across the provinces of the Church, where feasible.
3. Committee Officers
  - i. The President will appoint the Chair, Vice-Chair, Secretary, and any other officers deemed necessary of each Legislative Committee.
  - ii. The President must appoint the officers of Legislative Committees no later than 90 days before the first legislative day of General Convention.
4. Publication of Committee Appointments
  - i. The designation of Legislative Committees, the membership, and officers will be publicly available.
  - ii. The Secretary of the House of Deputies will make the information about Legislative Committees known to the Church.
5. Role and Authority of Legislative Committees. Each Legislative Committee will have the following roles and responsibilities:
  - i. Consider Resolutions, Memorials, and other matters referred to it for action or information.
  - ii. Propose Resolutions and Memorials on subjects that have not been referred to it for action but which are within the scope of the description of their responsibilities in Rule VIII.A.1.ii or as assigned by the President.
  - iii. Hold hearings.
  - iv. Prepare reports and recommend actions on Resolutions, Memorials, and other matters referred to it.
6. Committee Meetings
  - i. The Secretary of the House of Deputies will arrange a meeting space for each Legislative Committee.
  - ii. The meeting location for each Legislative Committee will be made available to the House of Deputies and the public by the Secretary of the House of Deputies.
  - iii. The President may direct any Legislative Committee to convene and consider matters referred to it prior to the time set for Legislative Committee meetings at the General Convention site by the Joint Standing Committee on Planning and Arrangements. Such meetings will be held electronically in a way that all members can hear all other members.
  - iv. A meeting may be called by the Chair or by a majority of the members.
  - v. In accordance with Canon V.3.1, a quorum will be a majority of all the members.
  - vi. Legislative Committees may, but are not required to, meet in cognate session with a House of Bishops Legislative Committee assigned to consider the same matter or matters. The House of Deputies Legislative Committee must always vote separately on the final action on any matter referred to it.
  - vii. Only members of the Legislative Committee may speak during meetings, unless the Chair invites other persons to speak.
  - viii. All meetings of Legislative Committees will be open to the public, unless the Committee votes to hold a closed meeting.
  - ix. A Legislative Committee may hold a closed meeting upon a two-thirds vote of the members present. No final action on a matter referred to the Committee may be taken during a closed meeting.
7. The Secretary of the Legislative Committee will keep (or cause) a record of:
  - i. time and place of each meeting;
  - ii. attendance of Committee members at each meeting;
  - iii. resolutions and matters considered at each meeting and all actions taken on them; and
  - iv. all other motions and actions of the Committee.
8. The Secretary of the Legislative Committee will file the record of each Legislative Committee meeting with the Secretary of the House of Deputies at the conclusion of each meeting.

B. Legislative Committee Hearings

1. Hearings Required

- i. Legislative Committees must hold a hearing on every Resolution, Memorial, or other matter referred to it for action or prepared by it before taking final action.
- ii. Legislative Committees should try to schedule all Resolutions, Memorials, or other matters on the same subject for hearing at the same time.
- iii. Hearings may be held by Legislative Committees as early as two (2) days before the first legislative day of General Convention.

2. Notice of Hearings

- i. Before General Convention. A Legislative Committee may deliver a Notice of Hearing to the Secretary of the House of Deputies at any time more than seven (7) days before the first legislative day of General Convention. Upon receipt, the Notice of Hearing will be posted by the Secretary on the General Convention website. All hearings to be held two days before the first legislative day of General Convention must comply with this Rule.
- ii. During General Convention. For hearings to be held one day before the first legislative day of General Convention or thereafter during General Convention, a Legislative Committee will deliver the Notice of Hearing to the Secretary of the House of Deputies so that it can be posted by the Secretary on the General Convention website at least eight (8) hours before the hearing. For hearings scheduled before 10:00 a.m., the Notice of Hearing must be posted by the Secretary by 6:00 p.m. of the day before the hearing.
- iii. The Secretary of the House of Deputies will specify the form for the Notice of Hearing.

3. Testimony at Hearings

- i. Any person may testify before the Legislative Committee.
- ii. All persons who wish to testify before the Legislative Committee must register by signing a witness sheet.
- iii. A person testifying must identify himself or herself by name, status (Deputy, Bishop, or Visitor), Diocese, organization represented, if any, and the Resolution or matter on which they wish to testify.
- iv. The Chair may limit the number of persons who may testify, set time limits, alternate pro and con, give preference to Deputies or other groups of persons, and otherwise regulate the hearing.

4. Record of Hearings

- i. The Secretary of the Legislative Committee will keep (or cause) a record of:
  - a) time and place of each hearing;
  - b) attendance of Committee members at each hearing;
  - c) Resolutions and matters considered at each hearing; and
  - d) name and identifying information of each person testifying before the Legislative Committee and the Resolution or matter upon which each spoke.
- ii. The Secretary of the Legislative Committee will file the record of each Legislative Committee hearing with the Secretary of the House of Deputies at the conclusion of each hearing.

C. Legislative Committee Reports

- 1. Each Legislative Committee must take final action on every Resolution and other matter referred to it for action to recommend to the House that the House takes one of the following acts:
  - i. **adopt as proposed;**
  - ii. **adopt as amended** by the Legislative Committee;
  - iii. **adopt a substitute**
    - a) A substitute Resolution must be on the same subject as the Resolution referred to the Legislative Committee for action.
    - b) A substitute Resolution may only cover one Resolution referred to the Legislative Committee for action.
    - c) If the House declines to adopt a substitute, the original resolution will be automatically referred back to the Committee for additional consideration.

- iv. **adopt a consolidated substitute**
    - a) A consolidated substitute Resolution must be on the same subject as the Resolutions referred to the Legislative Committee for action.
    - b) Its report on the final action on that Resolution must identify all the other Resolutions the substitute is intended to cover.
    - c) A vote by the Legislative Committee to recommend adoption of a consolidated substitute will be an automatic recommendation to **take no action** on all other Resolutions the consolidated substitute is intended to cover.
    - d) If the House declines to adopt a consolidated substitute, the original resolutions will be automatically referred back to the Committee for additional consideration.
  - v. **reject**
  - vi. **refer** to a specified Standing Commission, General Convention Task Force, Executive Council or other body of the Church for study, action, or to make recommendations on the subject to the next General Convention
  - vii. **take no further action because**
    - a) the matter has already been dealt with by action of the House of Deputies at this meeting of General Convention;
    - b) the matter is covered by a Resolution of a prior General Convention;
    - c) for other reasons;
  - viii. **If the Resolution or matter has been acted on by the House of Bishops:**
    - a) concur with the action of the House of Bishops;
    - b) concur as amended by the House of Deputies Legislative Committee;
    - c) concur with substitute by the House of Deputies Legislative Committee;
    - d) not concur and take a different action;
    - e) not concur;
  - ix. A House of Bishops Message to discharge will be treated as **take no action**.
2. Minority Report
- i. If there is a minority position on a final action on a Resolution or other matter and the minority requests to make a minority report to the House, the Chair will include the minority report in the Legislative Committee's report on the final action on the Resolution or other matter.
  - ii. A minority position consists of at least one-quarter (1/4) of the members of the Legislative Committee present and voting on the Resolution, Memorial, or other matter.

## IX. Other Committees

### A. General Rules on Other Committees

#### 1. Appointment and Creation

- i. The President may designate other Committees for the work of the House of Deputies at General Convention no later than 90 days before the first legislative day of General Convention, except that Conference Committees will be appointed as needed.
- ii. The Committees may include the following and any others that the President designates:
  - a) Resolution Review
    - 1. The Resolution Review Committee will review all Resolutions submitted prior to General Convention to ensure that they are consistent with the polity of this Church, that they are in the form required by the canons, and to assess whether they have funding implications.
    - 2. The Committee will prepare a report on each Resolution or Memorial and provide it to the chair of the Legislative Committee to which the Resolution or Memorial is referred for action. The Committee will continue the review process while General Convention is in session.
    - 3. The Committee may draft or redraft any matter in the proper language upon referral by the President, Legislative Committee, Deputy, or the House.

- b) Legislative Aides
  - 1. The President may appoint Legislative Aides to assist Legislative Committees in the conduct of business prior to and during General Convention.
- 2. Membership and Composition
  - i. The President will determine the size of each other Committee and appoint the members.
  - ii. Members of other Committees need not be Deputies.
  - iii. The President will be a member of all other Committees, *ex officio*.
- 3. Committee Officers
  - i. The President will appoint the Chair, Vice-Chair, Secretary, and any other officers deemed necessary of each other Committee.
  - ii. The Secretary of the House of Deputies will make the information about other Committees known to the Church.
- B. Committee Meetings
  - 1. The Secretary of the House of Deputies will arrange a meeting space for each Committee.
- C. Conference Committees
  - 1. Creation. A Conference Committee will be created by:
    - i. A vote by the House to refer legislation passed by the House of Bishops to a Conference Committee; or
    - ii. When the House has concurred, with amendments, in action taken by the House of Bishops to concur with amendments on legislation passed by the House.
  - 2. Appointment. The President will appoint all members of a Conference Committee from the House of Deputies.
  - 3. Final Action. When a Committee of Conference has been formed, the final action upon the matter under consideration will be deferred until the Conference Committee has reported to this House.

## **X. Special Committees**

- A. The President may designate Special Committees for the work of the House of Deputies at or between sessions of the General Convention.
- B. Membership and Composition
  - 1. The President will determine the size of each Special Committee and appoint the members.
  - 2. Members of Special Committees need not be Deputies.
  - 3. The President will be a member of all Special Committees, *ex officio*.
- C. Committee Officers
  - 1. The President will appoint the Chair, Vice-Chair, Secretary, and any other officers deemed necessary of each Special Committee.
  - 2. The Secretary of the House of Deputies will make the information about Special Committees known to the Church.

## **XI. Sessions of the House**

- A. Legislative Sessions
  - 1. Purpose. A Legislative Session is a regular session of the House of Deputies where the House considers resolutions, hears reports from committees, and provides Deputies an opportunity to debate.
- B. Special Order Sessions
  - 1. Purpose. A Special Order Session is a session set by the House to consider a particular legislation, topic, or other matter under special rules for deliberation and debate. Sessions can be used to consider important or strategic matters in an informal manner for conversation and connection.
  - 2. How Brought. A Special Order Session may be scheduled by a two-thirds vote of the House.

C. Closed Sessions

1. Purpose. A Closed Session has limited attendance and is used to discuss sensitive or pastoral matters.
2. How brought. The Deputies may vote to enter a Closed Session by a majority vote.
3. Who may attend. Only the following may attend a closed session:
  - i. Deputies;
  - ii. Officers of the House of Deputies;
  - iii. persons given seat on the floor of the House;
  - iv. other people authorized by the House;
  - v. other people authorized by the President.
4. Special Rules regarding Closed Sessions
  - i. Minutes will be kept by the Secretary for all Closed Sessions. Minutes taken during a Closed Session may only be reviewed and revealed in a Closed Session.
  - ii. Personal Electronic Devices may not be used to communicate during the Closed Session.
  - iii. Members are honor bound to keep the proceedings of a Closed Session confidential.

**XII. Debate**

A. Deputies may debate.

1. Any Deputy or person given seat and voice on the floor of the House may participate in debate, unless a rule of the House specifies otherwise.

B. Definitions

1. Debate. Debates are an opportunity for Deputies to engage in discussion on any matter.
2. Matter. A matter includes any Resolution, Memorial, motion, message from the House of Bishops, or Committee report that is presented to the House to consider and act upon.

C. Deputies may engage in debate on any matter except when:

1. debate has been ended by a vote of the House;
2. debate is not allowed due to a Rule of the House, a Joint Rule, a Canon, or the Constitution.

D. Time Limits

1. A total of 30 minutes is the maximum time allowed to debate on:
  - i. any matter; and
  - ii. all motions related to that matter.
2. If a person rises to speak during the first six minutes, no member may move the following unless no person seeks to debate on the matter:
  - i. amend the motion or resolution;
  - ii. move a substitute;
  - iii. end debate.
3. During a Debate on any motion or matter, a member may:
  - i. speak up to 2 minutes, or up to 4 minutes if translation is required, after being recognized by the Chair;
  - ii. speak twice.
4. Debate will end following:
  - i. a successful vote to end debate;
  - ii. the end of the time allowed for debate by a Rule or Special Order; or
  - iii. by the President if
    - a) at least three people have spoken in favor of the matter and no one rises to speak against; or
    - b) at least three people have spoken against the matter and no one rises to speak in favor; or
    - c) no one rises to speak on the matter.



### **XIII. Motions**

#### **A. How Made**

1. Motions may be made by any Deputy or other person authorized to make a motion by the Rules of the House;
2. A Deputy wishing to make a motion must:
  - i. acknowledge their intent to make a motion in any queuing system; and
  - ii. be recognized by the President or presiding officer.

**B. Types of Motion.** Any Deputy may make one of the following motions and no other motions may be made on the floor of the House:

#### **1. Motions that affect the general business of the House:**

- i. Adjourn or Recess:
  - a) Is used to end a session (adjourn) or take a short recess.
  - b) Has the following characteristics:
    1. No debate is allowed.
    2. No amendments may be made.
    3. A majority vote is required.
- ii. Adjourn and reconvene at a specific time:
  - a) Is used to end a session and set a time to reconvene.
  - b) Has the following characteristics:
    1. Debate is only allowed on the time.
    2. Amendments are only allowed on the time.
- iii. Appeal the ruling of the President or presiding officer:
  - a) Is used to appeal any decision of the President or presiding officer on any question of procedure;
  - b) Has the following characteristics:
    1. Debate is allowed.
    2. Amendments are allowed.
    3. A majority vote is required.
- iv. To Create a Special Order of Business or Change the Order of Business
  - a) Is used to create a Special Order of Business that is not included in the Convention schedule or change an existing Order of Business. It may also include special rules to govern how the order is to be carried out.
  - b) Has the following characteristics:
    1. Amendments are allowed.
    2. Debate is allowed.
    3. A two-thirds vote is required.
- v. To Suspend the Rules
  - a) Is used to suspend or modify the Rules of the House that interfere with a particular goal of the House.
  - b) Has the following characteristics:
    1. Amendments are allowed.
    2. Debate is allowed.
    3. A two-thirds vote is required.

#### **2. Motions that affect debate on a resolution or matter:**

- i. End Debate and Vote Immediately:
  - a) Is used to end the debate on a motion, resolution, report, or other action item and to force a vote on the motion. It is also sometimes known as “moving the previous question.”
  - b) Has the following characteristics:
    1. May not be made on a Resolution and an amendment at the same time;
    2. No debate is allowed;
    3. A two-thirds majority vote is required.

- ii. Postpone Debating a Motion or Resolution Until a Specific Time
    - a) Is used to postpone debating and considering a motion or Resolution until a certain time, after a certain time has elapsed, or after an event has occurred. It cannot be used to kill a motion.
    - b) Has the following characteristics:
      - 1. Debate is allowed.
      - 2. Amendments are allowed.
      - 3. A majority vote is required.
  - iii. To Recall from a Committee
    - a) Is used to bring something out of a committee and immediately to the floor of the House.
    - b) Has the following characteristics:
      - 1. May not be brought until the fourth legislative day.
      - 2. Debate is allowed.
      - 3. No amendments are allowed.
      - 4. A two-thirds vote is required.
3. **Motions that affect what is done with a matter:**
- i. To refer back to the originating committee, a different committee, a Standing Commission, or other body
    - a) Is used to refer a matter to a committee or group to study the Matter and report back suggested amendments or actions.
    - b) Has the following characteristics:
      - 1. May be debated.
      - 2. May be amended as to the body referred.
      - 3. A majority vote is required.
  - ii. Take No Action
    - a) Is used to stop considering a particular Resolution or Memorial and remove it from further consideration at the current meeting of the House.
    - b) Has the following characteristics:
      - 1. Debate is allowed.
      - 2. No amendments are allowed.
      - 3. A majority vote is required.
  - iii. To Amend or Substitute
    - a) Is used to modify or change a Resolution or motion. This would include a technical change or a substantive change that would alter the meaning or the intent of a Resolution or motion. Amendments must be related to the item in the resolution or motion that they are trying to change.
    - b) Secondary Amendments are:
      - 1. proposed changes to an amendment. Secondary amendments must relate to the specific subject of an amendment and may not be used to alter other parts of a Resolution or parts not affected by an amendment.
    - c) Has the following characteristics:
      - 1. Debate is allowed.
      - 2. Secondary amendments are allowed.
      - 3. A majority vote is required.
  - iv. To Divide the Matter
    - a) Is used to divide a motion, Resolution, or Memorial into separate parts and vote separately. If the motion is easily divisible into separate subjects, it may be divided by the Chair at a request of a member.
    - b) Process to use this motion:
      - 1. First make the motion to divide the question and explain where the motion should be divided.

2. The Chair then rules on the motion and whether it is divisible or not.
3. If the Chair rules it is not divisible, any Deputy may appeal the ruling of the presiding officer.
- v. To Reconsider Something Previously Acted Upon
  - a) Is used to reconsider a Matter which was previously voted upon by the House at the current meeting of the General Convention.
  - b) Has the following characteristics:
    1. Any deputy may move to reconsider a resolution.
    2. No amendments are allowed.
    3. Debate is allowed if the item being reconsidered is debatable.
    4. A majority vote is required.
    5. If the motion for reconsideration is adopted, the Resolution is restored to where it was immediately before the previous action being reconsidered was taken by the House.

#### **XIV. Voting**

- A. Every member must vote when a matter is put to a vote.
- B. The President may excuse a member from voting on a matter, if:
  1. the member has a conflict of interest; or
  2. for other good cause.
- C. Vote necessary to adopt a matter. The amount of votes necessary to pass a measure is:
  1. A majority vote consists of more than half of the votes.
  2. A two-thirds vote consists of more than two-thirds of the votes.
  3. A majority Vote by Orders consists of a more than half of the lay deputations and more than half of the clergy deputations.
- D. Counting the votes. The amount necessary to pass a matter will be determined by those present and voting.
- E. Procedure on a Vote by Orders.
  1. Art. 1 Sec. 5 of the Constitution states that:
    - i. the vote of each order, Clerical and Lay, will be counted separately and each order in each Diocese will have one vote;
    - ii. to carry in the affirmative any question being voted on by orders requires concurrence in the affirmative by both orders;
    - iii. concurrence in the affirmative by an order requires the affirmative vote in that order by a majority of the Dioceses present in that order unless a greater vote is required by the Constitution or by the Canons;
    - iv. an affirmative vote of a Clerical or Lay order requires a majority of the Deputies present in that order in that Diocese.
  2. No Vote. A no vote (i.e., not in the affirmative) occurs when the majority of a Clerical or a Lay deputation's vote is against a matter or is tied.
  3. Two-Thirds Vote. If a motion under the Rules requires a two-thirds vote, and a Vote by Orders is called, the motion will pass if there is concurrence in the affirmative by both orders.
  4. Counting. The count on a Vote by Orders will be by either electronic or written means as required by the President or presiding officer.
  5. Publishing the results. The results of all Votes by Orders will be posted promptly in a manner readily accessible to the House and the public and will include how each order in each diocese voted.
  6. Polling. The vote of the individual Deputies of a Diocese must be stated and recorded when requested by a member of the Deputation.

## **XV. Elections**

### **A. Nominations**

1. Nominations by any two Deputies are permitted before any election by the House.
2. Each nomination is submitted in writing, in a form adopted by the Joint Standing Committee on Nominations, to the Secretary, no later than the third legislative day.
3. There are no nominating speeches for any office or position, except for the President and Vice-President of the House.

### **B. Voting Requirements**

1. All elections will be by individual secret ballot, paper or electronic, except where there are no more nominees than open seats, in which case the vote may be by voice.
2. A majority vote is required to elect.

### **C. Balloting Procedures**

1. In all elections in which there are eight or fewer nominees, after the third ballot there will be only two more nominees than the number of vacancies to be filled on the ballot. After the fifth ballot, only one more nominee than the number of vacancies to be filled will be on the ballot.
2. In all elections in which there are more than eight nominees, after the third ballot there will be only four more nominees than the number of vacancies to be filled on the ballot.
3. After the fifth ballot, there will be only one more nominee than the number of vacancies to be filled on the ballot.

## **XVI. Confirmation of the Election of a Presiding Bishop**

- A. When the President receives the name of the bishop elected by the House of Bishops, the President will refer the name to the Legislative Committee on the Confirmation of the Presiding Bishop.
- B. The Legislative Committee on the Confirmation of the Presiding Bishop will make a recommendation to the House on whether to confirm or not to confirm the choice of the House of Bishops.
- C. The House may choose to receive the Committee's report to the House in Closed Session.
- D. If the House chooses to receive the report in Closed Session, the House may continue in Closed Session for the purpose of debate.
- E. Following the end of debate, the House will move out of Closed Session. The Committee will repeat its recommendation, and the House will immediately vote on the recommendation.
- F. The House will vote by individual secret ballot, paper or electronic, unless a Vote by Orders is requested.

## **XVII. Parliamentary Authority**

- A. The latest edition of *Robert's Rules of Order, Newly Revised* will govern the interpretation of these Rules and Procedures to the extent that *Robert's* is not inconsistent with these rules.
- B. The Constitution, Canons, Joint Rules, and Rules of this House take precedence when there is a conflict with *Robert's Rules of Order*.

## **XVIII. Supremacy and In-Force Clause**

- A. These Rules are subordinate to the Constitution, Canons, and Joint Rules of Order of the General Convention.
- B. These Rules remain in force at each meeting until amended, revoked, or replaced by the House.

**XIX. Amendments to the Rules of Order**

- A. The House may amend these Rules at any time by a two-thirds majority vote of the members present.
- B. The Legislative Committee on Rules of Order will consider all proposed amendments to the Rules and make recommendations to the House.
- C. All amendments to these Rules take effect immediately unless expressly provided otherwise.

# EXECUTIVE COUNCIL

## Membership

### Officers

The Most Rev. Katharine Jefferts Schori, Presiding Bishop, DFMS President, and *Chair*  
The Rev. Gay Clark Jennings, President, House of Deputies, DFMS Vice President, and *Vice Chair*  
The Rt. Rev. Stacy Sauls, DFMS Vice President  
The Rev. Canon Michael Barlowe, *Secretary*  
Mr. N. Kurt Barnes, *Treasurer*

### Elected by General Convention until General Convention 2015

Ms. Elizabeth Anderson  
Ms. Sarah Dylan Breuer  
Ms. Stephanie T. Cheney  
The Rt. Rev. Wendell N. Gibbs, Jr.  
The Rt. Rev. Mark Hollingsworth, Jr.  
Mr. Stephen F. Hutchinson  
The Rev. Brandon Maui, *elected 4/2014, replacing The Rev. Terry Star, deceased*  
Mr. Francisco Quiñones  
The Rev. Silvestre E. Romero, Jr.  
Ms. Katie Sherrod

### Elected by Province until General Convention 2015

I. Ms. Anne Watkins (Connecticut)  
II. Ms. Martha Gardner (Newark)  
III. Ms. Jane Cosby (Pennsylvania)  
IV. The Rev. Brian Cole (Lexington)  
V. Ms. Deborah J. Stokes (Southern Ohio)  
VI. Ms. Lelanda S. Lee (Colorado)  
VII. Ms. Vycke McEwen (Oklahoma), *resigned 9/2014*  
VIII. Mr. Bryan Krislock (Olympia)  
IX. The Rev. Cristóbal León Lozano (Ecuador Litoral)

### Elected by General Convention until General Convention 2018

The Rt. Rev. David Bailey  
The Rt. Rev. Clifton Daniel III  
Mr. Joseph Ferrell  
Dr. Anita George  
Dr. Fredrica Harris Thompsett  
Mr. John Johnson  
Ms. Nancy Koonce  
Ms. Karen Ann Longenecker  
The Rev. Dr. James B. Simons  
The Rev. Susan Brown Snook

### **Elected by Province until General Convention 2018**

- I. The Rev. Canon Tanya Wallace (Western Massachusetts, I),  
*elected 8/2014, replacing The Rev. Canon Charles LaFond, resigned*
- II. The Rev. Dahn Gandell (Rochester)
- III. The Rev. Nathaniel Pierce (Easton), *elected 12/2013,*  
*replacing The Very Rev. Christopher Cunningham, resigned*
- IV. Ms. Tess Judge (East Carolina)
- V. The Rev. Marion Luckey (Northern Michigan)
- VI. The Rev. Canon John Floberg (North Dakota)
- VII. The Rev. Dr. R. Stan Runnels (West Missouri)
- VIII. The Very Rev. Dr. Brian Baker (Northern California),  
*elected 1/2014, replacing The Rev. Canon Michael Barlowe, resigned*
- IX. Sra. Pragedes Coromoto Jiménez de Salazar (Venezuela)

### **By Invitation**

The Rev. Stephen Herr, Liaison, Evangelical Lutheran Church in America  
 The Very Rev. Peter Wall, Liaison, Anglican Church of Canada,  
*elected July 2013, replacing The Rt. Rev. James A. J. Cowan, resigned*

## Summary of Work

**Mandate:** To carry out the program and policies adopted by the General Convention. The Executive Council shall have charge of the coordination, development, and implementation of the ministry and mission of the Church.

### **Meetings**

- New Brunswick, New Jersey, October 15-18, 2012
- Linthicum Heights, Maryland, February 25-27, 2013
- Linthicum Heights, Maryland, June 8-10, 2013
- Chicago, Illinois, October 15-17, 2013
- Linthicum Heights, Maryland, February 5-7, 2014
- Phoenix, Arizona, June 10-12, 2014
- Linthicum Heights, Maryland, October 24-27, 2014
- Linthicum Heights, Maryland, January 9-11, 2015
- Salt Lake City, Utah, March 19-21, 2015

The Executive Council began the triennium with a new President of the House of Deputies, The Rev. Gay Clark Jennings, who also serves as DFMS Vice President and Vice Chair of Council. The bylaws of Council, adopted June 17, 2011 and revised April 20, 2012, give seat and voice at Council meetings to the Vice President of the House of Deputies, the Honorable Byron Rushing; and to representatives appointed by the Anglican Church of Canada, the Evangelical Lutheran Church in America (ELCA), and the Moravian Church's Northern or Southern Provinces.

Brother Robert Sevensky, OHC, was appointed Council's chaplain and liturgist. In early 2013, after the retirement of The Rev. Canon Dr. Gregory S. Straub, The Rev. Canon Michael Barlowe was appointed as Executive Officer and Secretary of the House of Deputies and was asked to take on the duties of Secretary to General Convention and Executive Council on an *ad hoc* basis, since the Canons require an election to those positions at the 78th General Convention.

Council, per its bylaws, elects an Executive Committee composed of the Chair, the Vice Chair, and six members, two of whom are from those serving in their first triennium. In this triennium, the five Joint Standing Committees (JSCs) from the prior triennium were continued: two administrative JSCs — Finances for Mission (FFM) and Governance and Administration (GAM) — and programmatic JSCs Advocacy and Networking for Mission (A&N), Local Ministry and Mission (LMM), and World Mission (WM). Other committees of Council included: the Episcopal News Service Resource Council; the Executive Council Committees on Anti-Racism; Corporate Social Responsibility; Indigenous Ministries; Science, Technology and Faith; Status of Women; Economic Justice Loan Committee; Investment; and the Joint Audit Committee.

Council began its work with a spirit of reform and looked at its organization and ways of doing business and being in relationship with fresh eyes, guided by the Five Marks of Mission and a desire to work collaboratively with voices from all parts of the Church. Reform influences included: (1) the Task Force for Reimagining The Episcopal Church (TREC), established by the 77th General Convention Resolution C095 charging TREC to create a plan for reforming the Church's structures, governance, and administration; (2) a new budget process organized around the Five Marks of Mission and a budget visioning process that invited church members to share their priorities via an online survey and for all committees, commissions, agencies, and boards (CCABs) to give input to the Joint Standing Committees of the DFMS and Council to whom they report; and (3) a desire by Council to work collaboratively across JSC lines and with DFMS staff liaisons and to engage in more dialog on important topics in both plenary and committee settings. Council also took advantage of increased technological capabilities that supported numerous webconference and teleconference meetings, especially of committees and subcommittees, which facilitated Council work being done between the nine regularly scheduled Council meetings in the triennium.

Council's first meeting in October, 2012, in New Brunswick, NJ, afforded members the opportunity to visit the DFMS offices in New York City and to meet with staff members face-to-face. That visit proved to be a good orientation for all Council members and formed a good basis for building collaborative relationships with staff liaisons to the JSCs.

Council engaged the Five Marks of Mission project initiatives in its first and second meetings, which were assigned to the three programmatic JSCs. (1) Local Ministry and Mission took responsibility for Mark 1, "Proclaim the good news," by starting new congregations and a Mission Enterprise Fund; (2) World Mission took responsibility for Mark 2, "Teach, baptize, and nurture new believers," by strengthening Province IX for sustainable mission; and for Mark 3, "Respond to human need in loving service," by making missionary service available for all Episcopal young people; and (3) Advocacy and Networking for Mission took responsibility for Mark 4, "Seek to change unjust structures, to challenge violence of every kind, and to pursue peace and reconciliation" by engaging Episcopalians in eradication of domestic poverty through Jubilee Ministries; and for Mark 5, "Strive to safeguard the integrity of creation and sustain and renew the life of the earth.

As the actual work progressed in the triennium, the JSCs have continued to monitor the work in consultation with DFMS staff. The Five Marks of Mission have provided an organic organizing framework for discussing and assessing the allocation of church resources to the Church's work.

At its February 2013 meeting, Council received an overview and experience of The Art of Hosting Conversations that Matter, which was co-led by The Rev. Tom Brackett, Missioner for Church Planting and Ministry Redevelopment and The Rev. Canon Charles LaFond. The Art of Hosting is a leadership approach that uses personal practice, dialog, facilitation, and the co-creation of innovation to address complex challenges; and has evolved to support the work called for by General Convention Resolution 2012-A073, Establish Diocesan Mission Enterprise Zones.



At that same meeting, Council sunsetted the Council Committee on HIV/AIDS and transferred its work to the Standing Commission on Health through the National Episcopal AIDS Coalition; and sunsetted the Council Committees on Archives Strategy, Jubilee Advisory, and Strategic Planning in accordance with Article VIII of the bylaws. Council also extended the Council Committees on Corporate Social Responsibility; Indigenous Ministries; Economic Justice Loans; Science, Technology and Faith; and Status of Women until December 31, 2015.

At its June 2013 meeting, Council elected the Canon Rosalie Simmonds Ballentine from the Diocese of the Virgin Islands to serve as the Church's lay representative to the Anglican Consultative Council.

An innovation in this triennium has been the appointment of three coordinating committees to address topics that impact the work of several CCABs. Members were appointed from relevant CCABs, which worked in collaboration with DFMS staff from different departments. Coordinating committees created were B019 on a Just Peace for Israelis and Palestinians; A135 on Domestic Poverty; and D042 on Human Trafficking. The B019 and D042 coordinating committees have submitted their own Blue Book reports as part of Council's report.

The work of the A135 Coordinating Committee has been primarily within the portfolio of the Missioner for Domestic Poverty, newly appointed in September 2013. The JSCs on Advocacy and Networking for Mission and on World Mission jointly issued a memorandum on Human Trafficking to describe the work done thus far, legislative history, and work yet to be done on the subject.

In late 2013 and early 2014, Council, through the JSC on Governance and Administration, engaged in listening, dialog, and partnership with the Board of the United Thank Offering (UTO) to arrive at a Memorandum of Understanding, to revise UTO board bylaws, and to revise grant focus and criteria to support UTO and its ministry of encouraging grassroots expressions of thankfulness. As a by-product of the work with the UTO, the JSC on Governance and Administration undertook a study, which is still in process, of boards and their relationship to DFMS and Council. Chairs of the Boards of Archives, Transition Ministry, and Examining Chaplains were invited to make presentations to Council and to the JSC in the course of its study.

At its October 2013 meeting, Council met in the ELCA Church Council space at their headquarters near O'Hare Airport in Chicago. ELCA Presiding Bishop Mark Hanson greeted Council, introduced key staff, and expressed deep gratitude for Bishop Jefferts Schori and the work of full communion. Council also received a briefing from TREC representatives, Dr. Catherine (Katy) George and The Rev. Dr. Dwight J. Zscheile, and shared observations that Council thought are important to the work of reimagining the Church.

Council, through the work of the JSCs on Finances for Mission and on Governance and Administration, continue to support and monitor the finances and health of several dioceses that have been in stages of distress and recovery from varying causes, such as division over human sexuality and natural disasters.

Responding to General Convention Resolution D016, Church Center Location, DFMS staff and Council have been engaged in an ongoing study of staffing, real estate, and other factors affecting the Church Center location. Out of necessity, due to potential issues affecting personnel and the volatile nature of real estate transactions, Council has conducted its study efforts with deference to the need for confidentiality until official announcements of decisions can be made.

At the close of the June 2014 Council meeting held in Phoenix, AZ, almost half of Council's members, at their own expense, traveled to attend the Navajoland Area Mission's annual convocation in Fort Defiance, AZ. This was a pilgrimage of grace, which led to increased awareness and understanding among Council members about the needs of Navajoland, and which built and deepened relationships.

## Budget

Throughout the triennium, a subcommittee of the JSC on Finances for Mission has led an effort to provide a new visionary budgeting process. Input from the CCABs, staff, and church members at large was invited through facilitated conversations led by Council liaisons to specific committees and groups (such as the ethnic ministry cohorts) and through an online survey mechanism. Frequent communications explaining the process were posted to a dedicated website. Representatives of the JSC on Program, Budget and Finance (PB&F) were invited to attend the meetings of the subcommittee and of Finances for Mission so that PB&F was fully involved in, and knowledgeable about, the step-by-step development of the budget.

The reports that follow from the Joint Standing Committees of DFMS and Council, the Council's Committees, and the Coordinating Committees will provide further details of the work done in collaboration with Council in this triennium.

## EXECUTIVE COUNCIL JOINT STANDING COMMITTEE FOR ADVOCACY AND NETWORKING FOR MISSION

### Membership

Ms. Lelanda Lee, *Chair*, 2015  
 Mr. John Johnson, *Vice Chair*, 2018  
 Ms. Stephanie Cheney, *Secretary*, 2015  
 The Rt. Rev. David Bailey, 2018  
 Ms. Sarah Dylan Breuer, 2015  
 Dr. Anita George, 2018  
 Sra. Pragedes Coromoto Jiménez de Salazar, 2018  
 Ms. Deborah J. Stokes, 2015  
 The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
 The Rev. Gay Clark Jennings, *Ex Officio*  
 Mr. Alex Baumgarten, *Staff Liaison*

The members of Advocacy and Networking include members from the junior and senior classes of Executive Council, with terms expiring at General Convention 2015 and 2018, respectively. In this triennium, a Spanish-language interpreter was present at all meetings to facilitate interpretation on behalf of Spanish speaker, Sra. Coromoto Jiménez.

Mr. Alex Baumgarten, Director of the Office of Public Engagement and Mission Communication, Director of the Office of Government Relations, and Team Lead of Justice and Advocacy Ministries, serves as DFMS staff liaison to the Committee for the purpose of providing legislative, diocesan, ecumenical, and interreligious background information on social justice and public policy issues under discussion in the Church and by the Committee and reporting on the status of the ongoing work of the DFMS staff on such issues, especially as they pertain to Anglican Marks of Mission IV and V.

Mission Mark IV states: To seek to transform unjust structures of society, to challenge violence of every kind and to pursue peace and reconciliation. Mission Mark V states: To strive to safeguard the integrity of creation and sustain and renew the life of the Earth.

Also, DFMS staff members — namely, The Rev. Canon Mark Stevenson, Missioner for Domestic Poverty; Ms. Katie Conway, Immigration and Refugee Policy Analyst; and Ms. Jayce Hafner, Domestic Policy Analyst — have provided ongoing support to Advocacy and Networking's work. The Committee has also begun to work closely with the Missioner for Racial Reconciliation, Ms. Heidi Kim; and with the Missioner for Social Justice and Advocacy Engagement, Mr. Chuck Wynder, as they engage their roles during the second half of 2014.

### Summary of Work

**Mandate:** To "focus on advocacy on the church-wide level," which includes "public policy, justice and peacemaking, anti-racism, poverty, health care, public education, prisons, [and] care for the Earth." Our Committee interacts with 10 different CCABs to achieve our mandate.

The work of Advocacy and Networking is informed by reading the news, which also is a barometer of how the social justice and public policy issues of concern to the Church have progressed in the wider world. As The Episcopal Church deepens its ecumenical and interreligious partnerships with other faith traditions and with local, regional, and global communities, increasingly the networking part of Advocacy and Networking's portfolio has expanded, enhancing our Church's voice and reach in acting justly, loving mercy, and walking

humbly with our Lord. What we can do alone as one faith tradition can be done more productively when we partner with other faith traditions, from the local partnerships of our Public Policy Network chapters to our church-wide, interreligious consultations on justice and policy issues that affect everyone, such as climate change.

The work of Advocacy and Networking in this triennium has been primarily shaped by Mission Marks IV and V and their respective block grants in the church-wide budget of \$1,000,000 with a goal of “Engaging Episcopalians in the Eradication of Domestic Poverty through Jubilee Ministries” and \$500,000 with a goal of “Creating and Strengthening Local Networks to Care for Creation.”

As Advocacy and Networking’s working relationships have matured through the completion of more than two-thirds of this triennium, there has been an increasing collaboration with the other two programmatic Joint Standing Committees — World Mission; and Local Ministry and Mission. Joint meetings were held to listen to briefings from staff and to discuss approaches to doing work in the areas of domestic poverty alleviation; Jubilee Ministry; Asset-Based Community Development; comprehensive immigration reform; detention and deportation policies; migration and refugee issues; human trafficking; Middle East peace and support for the Diocese of Jerusalem; and race, racism, and racial justice.

In addition to doing the typical work of a Joint Standing Committee, due to the nature of its mandate to focus on justice and peacemaking topics, Advocacy and Networking also exercises a prophetic role to call the Church to being and staying awake to the inhumane treatment suffered by the beloved people of our Creator.

### **Meetings**

In the Committee’s first seven in-person meetings held at Executive Council meetings, from October 2012 through October 2014, Advocacy and Networking heard reports from the following individuals on their areas of responsibility:

- *October 2012, New Brunswick, NJ* – Mr. Kim Byham, Chair of the Executive Council Committee on Corporate Social Responsibility; Ms. Sarah Eagle Heart, Missioner for Indigenous/Native American Ministries; Ms. Deb Stein, Director of Episcopal Migration Ministries
- *February 2013, Baltimore, MD* – Mr. Harry Van Buren, (then) Consultant to the Church Pension Fund, the Domestic and Foreign Missionary Society, and the Executive Council Committee on Corporate Social Responsibility, via conference call
- *June 2013, Baltimore, MD* – Ms. Katie Conway, Immigration and Refugee Policy Analyst
- *October 2013, Chicago, IL* – The Rev. Canon Mark Stevenson, Missioner for Domestic Poverty; and (because we were meeting at the Evangelical Lutheran Church in America headquarters offices in Chicago) Ms. Judith Roberts, ELCA Anti-Racism and Racial Justice Officer; Dr. Mary Streufert, ELCA Director for Women’s Ministries; and Pastor Roger Willer, Director of Theological Ethics
- *February 2014, Baltimore, MD* – Ms. Jayce Hafner, Domestic Policy Analyst; Ms. Lynnaia Main, Global Relations Officer; Ms. Allison Duvall, Co-Sponsorship and Church Relations Manager of Episcopal Migration Ministries
- *June 2014, Phoenix, AZ* – The Rev. Canon Mark Stevenson, Missioner for Domestic Poverty
- *October 2014, Baltimore, MD* – Dr. Navita Cummings James, Chair of the Executive Council Committee on Anti-Racism; Ms. Heidi Kim, Missioner for Racial Reconciliation; Mr. Chuck Wynder, Missioner for Social Justice and Advocacy Engagement

Advocacy and Networking also convened six meetings via teleconference on December 3, 2012; January 9, 2013; January 23, 2013; February 7, 2013; February 12, 2013; and January 22, 2014.

In recognition of the importance of her participation, Sra. Coromoto Jiménez, a Province IX Council member from Venezuela who has faced the extra challenge of our English-language-centric meetings, was asked to prepare a report of her participation on Advocacy and Networking in her own words, which follow and are translated into English:

"First I want to thank God for the opportunity to serve in The Episcopal Church. My experience since March 2012, when I was elected as a lay member to serve on the Executive Council to represent Province IX, has been very uplifting. I have had the wonderful opportunity to share experiences and actively participate in various committees and assignments. I am honored to be part of the Advocacy and Networking Committee. Due to limitations caused by the exclusive use of the English language, members of Province IX have had to rely on excellent simultaneous translation equipment, specialized technicians, and staff hired by the Church Center for the translation of documents. I thank Dinorah Pedro, Rosa Burkhardt, and Gabriela DeCastro for their great help. I should add that this has not limited the development of my work. The Episcopal Church is made up of multi-ethnic, pluralistic, and multilingual communities. For this reason I believe that each of its members is affected by this, but we are so creative that we seek the best way to evangelize through our gifts and talents for more effective and close communication. One of the blessings that the Lord has given us is the gift of communication. One way or another, we are able to get the message into our communities and into any area in which we are developing. Still, we have some way to go, and I am willing to be part of the development, growth, and history of The Episcopal Church."

*"En primer lugar quiero agradecer a Dios por la oportunidad de Servir en la Iglesia Episcopal, mi experiencia desde marzo 2012 cuando fui elegida como Miembro Laico para servir en el Consejo Ejecutivo, para representar a la IX Provincia, ha sido muy edificante, he tenido la maravillosa oportunidad de compartir experiencias y participar activamente en diferentes asignaciones y comités. Tengo el honor de formar parte del Comité Abogacía y Redes. Por limitaciones al idioma inglés los miembros de la IX Provincia hasta ahora hemos tenido que depender de un excelente equipo de traducción simultánea, de técnicos especializados y de personal del Centro de la Iglesia para la traducción de documentos. En lo personal agradezco a Dinorah, Rosa y Gabriela, por su gran ayuda, debo agregar que esto no ha sido limitante para desarrollar mi labor. La Iglesia Episcopal está integrada por comunidades multiétnicas, plurales y multilingüísticas y por esta razón considero que todos y cada uno de sus miembros son afectados, pero somos tan creativos que buscamos la mejor manera de evangelizar, a través de nuestros dones y talentos para que la comunicación sea más efectiva y cercana. Una de las bendiciones que Nuestro Señor nos ha regalado es el don de la comunicación, de una u otra manera somos capaces de hacer llegar el mensaje en nuestras comunidades, y en todo ámbito en el cual nos estemos desarrollando. Todavía queda camino por recorrer, y estoy dispuesta a ser parte del desarrollo, crecimiento y de la historia de La Iglesia Episcopal."*

Advocacy and Networking's resolutions, which were passed by Executive Council, included the following actions:

- Accepted the narrative report of the Executive Council Committee on Corporate Social Responsibility, outlining its triennial strategy
- Gave direction to the Treasurer of the Domestic and Foreign Missionary Society as to voting instructions on various Corporate Social Responsibility shareholder proxies
- Affirmed a comprehensive policy responding to gun violence
- Affirmed the Church's support of pay equity and non-discrimination in employment of women
- Established the B019 Coordinating Committee and affirmed the Church's stance "Toward a Just Peace for Israelis and Palestinians"
- Affirmed the Church's stance on worker safety and health domestically and globally

- Addressed issues of access to, and affordability of, higher education
- Commended the Evangelical Lutheran Church in America's 25th anniversary
- Affirmed support for the Voting Rights Act
- Commended the work of the Latin American communities on their work in support of women's reproductive rights
- Condemned the revocation of citizenship for certain Dominican Republic residents, who are primarily of Haitian descent
- Condemned the use of racially stereotypical and harmful Indian/Native American mascot names by sports teams
- Affirmed support and called for prayer for peace in South Sudan and Sudan
- Established a task force to address the Episcopal Archives location and building issues
- Established the D042 Human Trafficking Coordinating Committee
- Expressed solidarity with persecuted LGBTI individuals worldwide
- Opposed discrimination against women's access to health care, especially for contraception, pregnancy, and childbirth
- Supported "Net Neutrality," also known as "Open Internet"; and opposed a two-tiered internet system of "fast" and "slow" lanes
- Grieved the loss of life and livelihood suffered by both Palestinians and Israelis as a result of the 2014 Gaza War, and supported working toward conditions in the Gaza Strip that will make peaceful and sustainable rebuilding possible
- Adopted an investment screen against for-profit prisons
- Reaffirmed support for the Church's work on the repudiation of the Doctrine of Discovery
- Stated that #BlackLivesMatter, Too; and lifted up the teachings of the House of Bishops' Pastoral Letters on the 1994 "the Sin of Racism" and the 2006 "A Call to Covenant"

### **Action on Specific Resolutions of General Convention**

With regard to 2012-A076 (Strengthen Small Congregations), Advocacy and Networking remained mindful of the limited resources and special needs of small congregations when considering its resolutions that called for efforts on the part of all congregations.

With regard to 2012-A167 (HIV Welcoming Parish Initiative), after the Executive Council Committee on HIV/AIDS was sunsetted in February 2013 (GAM-003), the work rolled over to the National Episcopal AIDS Coalition (NEAC). NEAC board members diligently attempted to implement the Welcoming Parishes approach, which invited parishes to become designated as Welcoming Parishes that welcome people with HIV and AIDS. They met with considerable resistance by vestries to adopt this designation, primarily out misinformation and fear about HIV and AIDS. After considerable work, NEAC members have determined that without a funded mandate to do more to support the Welcoming Parish Initiative, their capacity and commitment is to educate the Church about issues of stigma associated with, and to advocate for those affected by, HIV and AIDS.

With regard to 2012-B019 (Israeli-Palestinian Peace and Support for the Diocese of Jerusalem), Advocacy and Networking advanced AN-008, which established the B019 Coordinating Committee. That Coordinating Committee has written its own Blue Book report as part of the Executive Council's report.

In closing, as The Episcopal Church, Executive Council, and Advocacy and Networking prepare for General Convention in summer 2015, there remain some urgent social justice and public policy issues that still require prayer, study, dialogue, advocacy, and action on the parts of the church-wide body and each Episcopalian. In summer 2014, the United Nations called out the United States of America on three occasions regarding domestic human rights violations against those living in poverty and those directly affected by racism and violence. Advocacy and Networking believes that the overarching issues of the day are the seeking of

sustained peace and cessation of violence and human rights violations in global hot spots; comprehensive immigration reform and humane solutions to refugee and migration issues and to systemic, institutionalized racism and its attendant violation of human rights; eradication of domestic poverty, including public-education reform; establishment of a living wage; the addressing of growing wealth disparity; and criminal-justice reform, which involves both race and poverty aspects.

## EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON FINANCES FOR MISSION

### Membership

The Rt. Rev. Mark Hollingsworth, Jr., *Chair*, 2015  
Dr. Fredrica Harris Thompsett, *Vice Chair*, 2018  
The Rev. Canon John Floberg, 2018  
Ms. Tess Judge, 2018  
Ms. Nancy Wonderlich Koonce, 2018  
Sr. Ing. Francisco Quiñones, 2015  
The Rev. Susan Brown Snook, 2018  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Mr. N. Kurt Barnes, *Staff Liaison*

### Summary of Work

**Mandate:** To focus on finance and development for mission, including resource development and oversight: budget oversight, development and mission funding, stewardship and giving, investments, and audit.

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

**Meetings:** Finances for Mission (FFM) met at every regular Executive Council meeting, as well as by conference call as needed. The Chair and other members of Program, Budget and Finance (PB&F) were invited to attend all FFM meetings.

It is Executive Council's responsibility to propose a budget for the 2016-18 triennium to the 2015 General Convention. The Program, Budget and Finance committee (PB&F) works with Executive Council's budget proposal and other information received via General Convention resolutions to create a budget resolution at Convention.

The Joint Standing Committee on Finances for Mission has spent significant time during the 2013-15 triennium both creating a new process for proposing a budget and working with financial estimates to create the actual budget proposal. This triennium has seen a completely new approach to the budget process. A subcommittee of Finances for Mission — chaired by The Rev. Susan Brown Snook and including members of FFM, PB&F, the Standing Commission on the Structure of the Church, and others — determined that it was essential to ask members of the Church from a wide variety of ministries to help create our budget priorities.

Therefore, beginning in 2013, we asked all Committees, Commissions, Agencies, and Boards (CCABs) overseeing ministry areas that receive funding from the General Convention budget to undergo a visioning process that helped determine their top budget priorities. Since the CCABs include membership from all orders of ministry, all geographic areas of the Church, and a diversity of ages and ethnicities, we felt that CCAB input would provide an excellent overview of the Church's priorities. We also asked officers of the



DFMS (the Presiding Bishop, the President of the House of Deputies, the Chief Operating Officer, and the Executive Officer of General Convention) to provide us with their budget priorities.

We then asked the other Joint Standing Committees of Executive Council to review the budget priorities of all the CCABs that report to them, and to provide FFM with a ranked list of priorities for the ministry areas they oversee. We worked with that ranked list to determine the top priority expenditures for the coming triennium.

At the same time that we worked on the expenditure side of the budget, we also worked carefully to determine an appropriate level of revenue. This work included estimating investment, rental, and other revenue for the coming triennium; and determining an appropriate draw from the endowment. Most importantly, it involved deciding on an appropriate level of revenue from the diocesan asking.

We created a survey for deputies and bishops regarding the diocesan asking and have listened carefully to their responses, including a strong majority that has asked for a lower level of asking in the 2016-18 triennium. Additionally, at FFM's request, conversations have been held in the House of Bishops and Executive Council on the amount of the diocesan asking and the consequences to mission and relationships resulting from those dioceses that do not contribute the full asking. Our budget proposal takes these responses into account and strives to balance the hopes for a lower diocesan asking with the many inspiring visions we received from the CCABs and others who submitted budget priorities. We hope that the resulting budget proposal demonstrates our priority for the Five Marks of Mission, balances mission and administration expenses, provides incentives for important strategic initiatives, and leaves more funds available at the diocesan level for local mission.

Some FFM members also participated on the Joint Subcommittee of Finances for Mission and on Governance and Administration for Mission on the Location of the Episcopal Church Center.

In other areas, on behalf of the Executive Council, the work done by FFM included:

- Reviewing periodic financial statements, Audit committee reports, and statements of operation for DFMS;
- Monitoring and recommending adjustments to the 2013-2015 triennial budget adopted by the General Convention;
- Recommending establishment of custodial trust funds for various parishes and dioceses;
- Recommending term loan refinancing to remove collateral and reduce interest rates;
- Recommending expansion and refinancing of the line of credit to provide necessary funds for reorganizing dioceses and to reduce annual costs; and
- Recommending approval of loans to reorganizing dioceses and dioceses in Province IX.

## EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON GOVERNANCE AND ADMINISTRATION FOR MISSION

Mr. Stephen Hutchinson, Esq., *Chair*, 2015

Mr. Bryan Krislock, Esq., *Vice Chair*, 2015

The Very Rev. Dr. Brian Baker, 2015

The Very Rev. Chris Cunningham, 2015

Mr. Joseph Ferrell, 2015

The Rt. Rev. Wendell Gibbs, 2015

Ms. Vycke McEwen

Ms. Katie Sherrod, 2015

The Most Rev. Katharine Jefferts Schori, *Ex Officio*

The Rev. Gay Clark Jennings, *Ex Officio*

The Rt. Rev. Stacy Sauls, *Staff*

### *Changes in Membership*

The Very Rev. Chris Cunningham, elected to the Council by Province III, resigned in early 2014 as a consequence of having moved out of the Province. The Very Rev. Dr. Brian Baker was appointed to fill a vacancy in Executive Council and was assigned to the Joint Standing Committee on Governance and Administration. Vycke McEwen resigned in September 2014.

### Summary of Work

**Mandate:** To facilitate the mission of The Episcopal Church by focusing on governance and administration including, but not limited to, Board (Executive Council) governance and function, Episcopal Church Center operations, communications, human resources policies, strategic planning; and relationships with the Archives of The Episcopal Church, the General Convention Office, and reorganized and renewing dioceses.

At the beginning of the 2009-2012 triennium, the Standing Committees of Council were realigned with a focus on mission. This resulted in five Joint Standing Committees of Council. This was more than an exercise in renaming — it was an attempt to remind us every time we utter the name of our Committee that we are to focus on how best to enable mission within the parameters of our area of responsibility. This focus has continued in this triennium.

**Meetings:** Also during this triennium, GAM, like much of the rest of the world, discovered itself doing more networking. We frequently worked horizontally across committee lines as various committees of Executive Council collaborated on items encompassing areas of responsibility of more than one committee. Several of these items were related to personnel, real estate, or litigation, necessitating our meeting in executive session. This was not in any effort to avoid transparency, but rather to respect boundaries, especially around areas of personnel, real estate, and litigation. For example, GAM met jointly with the Joint Standing Committee on Finances for Mission (FFM) to receive the reports of the Church Center relocation committees.

### United Thank Offering

GAM authorized its chair, Mr. Stephen Hutchison, to convene a working group to study canonical and operational considerations related to governance bodies that are denominated boards and agencies with a view toward clarifying their relationships to the General Convention and Executive Council. Mr. Hutchinson said that one of the big needs was to address issues of ambiguity of authority and fiduciary responsibilities.

As part of this work, Mr. Hutchison took part in the United Thank Offering (UTO)/GAM working group, along with Mr. Paul Nix, Esq. and Bishop Stacy Sauls, working with the board of the UTO. At the October 2012 meeting, GAM met with the leadership of the UTO in executive session, including The Rev. Sarah Carver, The Rev. John Tampa, Ms. Barbara Schafer, and Dr. Margaret (Peg) Cooper, who represented the UTO; and The Rev. Heather Melton, UTO Coordinator. Executive Council member The Rev. Marion Luckey also attended as the Council's liaison to the UTO Board.

This meeting was in the wake of very visible resignations of some UTO Board officers and members in protest over perceived efforts by Church Center staff and Council members to “take over” UTO. Following the executive session, GAM proposed, and Council adopted, a resolution that “acknowledges with deep regret the breakdown of communication and relationship between the board of the United Thank Offering and leadership of the DFMS” and states that the Council “is committed to a season of reconciliation and renewal of all involved in a thoughtful and faithful engagement and conversation to resolve matters of governance and administration, while honoring the UTO’s historic promotion of a theology of thankfulness, so that the mission of the UTO can be strengthened.”

The Council also committed itself to “continuing support of the UTO by offering gifts of thankfulness on a regular basis through the ‘little blue box’ or by directing gifts to the spring and fall ingatherings, and inviting the whole Episcopal Church to join us.” The Council also gave thanks “for the years of inspirational and prophetic service to the wider Church that the United Thank Offering and generations of women leaders have made, and look forward to celebrating the 125th anniversary of this important work as we seek renewal of this mission for generations to come.”

Mr. Hutchinson and Ms. Schafer, respectively, appointed members of the Council and the UTO Board to serve as a "UTO/GAM Working Group." This group met for a week in January 2014 and collaboratively developed new "Restated Bylaws of the United Thank Offering," a new Memorandum of Understanding for the United Thank Offering and the DFMS, and an extensive draft of new policies and procedures for the UTO. These documents were subsequently approved unanimously by the UTO Board in late January and were brought to Council for final approval in February.

GAM met jointly with the Joint Standing Committee on Finances for Mission (FFM) to act on the report from the UTO/GAM working group, following which GAM offered GAM 013 calling for the approval of restated bylaws. The resolution passed. This was followed by GAM 012, which put forward a new Memorandum of Understanding between the UTO and the DFMS. Mr. Hutchison noted that many aspects of the memorandum were already bearing fruit, resulting in a new level of collaboration between the UTO and staff. He did note that, in authority, the bylaws trump the Memorandum of Understanding. The question of to whom staff were accountable still needs to be addressed, as it has not been carefully articulated.

**Budget-Development and Church-Relocation Committees**

GAM also met jointly with FFM to receive the reports of the budget-development and Church-Center-relocation committees. The relocation committee conducted a survey of church members and leaders about their wishes and needs for a church center. At the June 2014 meeting, Council directed the GAM and FFM Joint Subcommittee on the Location of the Church Center to continue to evaluate the location of The Episcopal Church headquarters based upon on a wide range of factors, including: (1) cost and financial affordability; (2) travel and geographic accessibility; (3) employment and justice concerns; and (4) partnership opportunities. The Subcommittee is charged with continuing to gather all available data to complete the evaluation and retaining of necessary professionals and consultants to complete this task. The Executive Council has authorized the Subcommittee to spend up to \$100,000 to accomplish this work in response to General Convention Resolution D016.

**Episcopal Church Center Operations and Human Resources Policies**

GAM spent many hours working with Church Center staff, particularly Mr. John Colón and Mr. Paul Nix, to update the conflict of interest, nepotism, and whistleblower policies to bring them in line with New York state laws; and to make updates, corrections, and editorial changes to the Employee Handbook. GAM members Ms. Katie Sherrod and Mr. Bryan Krislock met regularly with members of the Joint Standing Committee on Advocacy and Networking for Mission about board development in regard to anti-racism training. Along with Ms. Anita George and Ms. Deborah Stokes, they made a proposal to the Council for a day-long, anti-racism training by a person from outside the Council. The proposal was referred to the Executive Committee of Council.

**Communications**

After hearing from Ms. Anne Rudig, Communications Director for the DFMS; and from members of the Episcopal News Advisory Council, GAM 007 proposed that the Episcopal News Advisory Council be renamed the Episcopal News Service Resource Council. Its mandate is as follows: “This Council shall engage with Episcopal News Service staff members about their newsgathering, distribution, creative, and publishing work. Council members shall lend their experience, expertise, and perspectives to the ENS staff, with the goal of helping Episcopal News Service in its efforts to serve effectively the needs of the Church at all levels (international, church-wide, diocesan, congregational) while keeping the voice of the whole church in a prominent place in the operation of the news service.” The resolution provided that the Presiding Officers shall appoint members of this renamed Council who shall:

- Have a proven track record of evolving their church communications efforts;
- Have a relationship of support, trust, and candor with ENS;
- Demonstrate forward-thinking use of current and evolving communications technologies in the service of communications evangelism; and
- Include leading communications professionals outside of Episcopal Church circles who have an interest in lending us their expertise.

**The Archives of the Episcopal Church — A162**

Reaffirm the Goal of an Archives Center was referred to GAM. The resolution remains under consideration by GAM. It is noted, however, that at the February 5-7 2014, meeting, Executive Council adopted A&N 025 on recommendation of the Joint Standing Committee on Advocacy and Networking for Mission, which calls on the presiding officers to consider alternatives for an Archives Center including, but not limited to, partnerships with the Evangelical Lutheran Church in America (ELCA) or other ecumenical partners; and to bring recommendations to Executive Council at its October 2014 meeting with a goal of identifying a long-term solution by the end of 2014.

**The General Convention Office**

GAM heard from The Rev. Canon Michael Barlowe that the Joint Standing Committee on Planning and Arrangements recommended that the 79th General Convention be held in the City of Austin, Diocese of Texas. Canon Barlowe pointed out that Canon I.1.14 requires that the Executive Council consent to the site selection. He reported that the Committee had considered several other potential sites (Knoxville, Atlanta, Charlotte, and Kansas City) but that Austin offered the most economical package, especially as to the cost of use of the convention center. He noted that one of the factors considered by the Committee was the extent to which the host diocese has accepted its asking for the Church’s budget. He reported that, in conversations with the Bishop of Texas, the Committee learned that the Diocese of Texas is doubling its financial commitment to the church-wide budget, on its way to paying more or all of its full asking.

**Joint Nominating Committee for the Election of the Presiding Bishop**

At the June 2013 meeting, GAM heard from members of the Joint Nominating Committee for the Election of the Presiding Bishop about the process so far. The mandate of the Joint Nominating Committee for the Election of the Presiding Bishop covers a very limited scope related to the transition of the Presiding Bishop. The Joint Nominating Committee is not responsible for the installation of the Presiding Bishop. GAM realized that there were significant planning, budget, and implementation issues that are not clearly the responsibility of any other CCAB or staff office, and that Executive Council bore the responsibility to ensure that such functions are properly planned, budgeted, and implemented.

GAM Resolution 006 provided that the presiding officers of Executive Council shall appoint a committee to work with the Joint Nominating Committee for the Election of the Presiding Bishop and with DFMS Staff to be responsible for the planning, budgeting, and oversight of: (1) the transition tasks not otherwise assigned by Canon to the Joint Nominating Committee; and (2) the installation of the Presiding Bishop to be elected at the 78th General Convention of The Episcopal Church; and that the Committee report regularly to GAM.

**Reorganized and Renewing Dioceses**

Working jointly with FFM, GAM presented resolutions that provided grants or loans to the Dioceses of San Joaquin and Quincy. GAM heard reports from representatives of the Dioceses of Fort Worth, Pittsburgh, Quincy, and San Joaquin; and was heartened by the courage and steadfast devotion to The Episcopal Church demonstrated by the people of these dioceses. GAM also worked with FFM to set up a Covenant Committee to work with The Episcopal Church in South Carolina and to report two times annually to Council's Joint Standing Committee on Local Ministry and Mission.

**Resolutions**

The following resolutions of the 77th General Convention were referred to GAM: A076, A106, A159, and A162 (dealt with in Archives section above):

- *A076 — Strengthen Small Congregations.* This resolution remains under consideration.
- *A106 — Amend Canon 1.9 [to require annual report to Executive Council by each Province].* At the June 8-10, 2013 meeting of the Executive Council, GAM recommended adoption of GAM 008, which prescribes a format for these reports. The resolution was adopted by Council. It is noted that Provincial Reports were duly submitted to the February 5-7, 2014 meeting of Council.
- *A159 — Amend Canon 1.4.3(h) [to sunset any committee of Executive Council, other than standing committees that are not explicitly extended].* At the February 25-27, 2013 meeting, GAM submitted two resolutions to Council pursuant to 2012 Resolution A159. GAM 003 recommended that the Executive Council Committee on HIV/AIDS be disbanded and that any remaining work be transferred to the Standing Commission on Health. The resolution further recommended that the following Executive Council committees be disbanded: Executive Council Archives Strategy Committee; Executive Council Jubilee Advisory Committee; and Executive Council Committee on Strategic Planning. The Committee also submitted GAM 004, which recommended that the following Executive Council Committees be extended through December 31, 2015: Executive Council Committee on Corporate Social Responsibility; Executive Council Committee on Indigenous Ministries; Executive Council/Economic Justice Loan Committee; Executive Council Committee on Science, Technology, and Faith; and the Executive Council Committee on the Status of Women. Both GAM 003 and GAM 004 were adopted by the Council.

## EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON LOCAL MINISTRY AND MISSION

### Membership

Ms. Anne Watkins, *Chair*, 2015  
 The Rev. Marion Luckey, *Vice Chair*, 2015  
 Ms. Liza Anderson, *Secretary*, 2015  
 Ms. Jane Cosby, 2015  
 The Rev. Charles LaFond, 2015  
 The Rev. Deacon Brandon Mauai, 2015  
 The Rev. Silvestre Romero, 2015  
 The Rev. Dr. James Simons, 2015  
 The Rev. Deacon Terry Starr, 2015  
 The Rev. Tanya Wallace, 2015  
 The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
 The Rev. Gay Clark Jennings, *Ex Officio*  
 Ms. Bronwyn Clark Skov, *Staff Liaison*

### *Changes in Membership*

The Rev. Charles LaFond resigned in 2013 as a result of moving out of Province I, and The Rev. Tanya Wallace was elected by Province I in his place. The Rev. Deacon Brandon Mauai was elected by the Executive Council in 2014 after the sudden death of our colleague, The Rev. Deacon Terry Starr.

The Committee benefited from strong collaborative relationships with ecumenical colleagues and with several members of staff. Our staff liaison was Ms. Bronwyn Clark Skov, the Officer for Youth Ministries and Team Leader for Formation and Vocation Ministries. We were also regularly joined by The Rev. Tom Brackett, Missioner for Church Planting and Ministry Redevelopment; by Ms. Sarah Eagle Heart, Missioner for Indigenous Ministries; and by Pastor Stephen Herr, Liaison from the Evangelical Lutheran Church in America.

### Summary of Work

**Mandate:** To focus on congregations and leadership on the local level, including work with individuals, congregations, and dioceses: congregational development, education and formation, ministry of the baptized, clergy, multiculturalism.

The work of the Committee focuses on congregations and leadership at the local level, including work with individuals, congregations, and dioceses: congregational development, education and formation, the ministry of the baptized, clergy, and multiculturalism. The scope of the Committee's work includes awarding Mission Enterprise Zone and New Church Start grants, recognizing Jubilee Centers, and awarding Constable grants. Together with the Joint Standing Committee on Advocacy and Networking, we emphasize the importance of racial and ethnic ministries in the Church, and anti-racism formation is central to our own work. In addition, several Standing Commissions report through our Committee: Lifelong Christian Education and Formation, Liturgy and Music, Ministry Development, Mission and Evangelism, and Small Congregations.

**Meetings:** Due to the volume of applications received, and to our desire to spend time in careful discernment around each of them, we quickly discovered that our face-to-face meetings would not be sufficient to complete all of the necessary work. We therefore met monthly via Adobe Connect to review applications, with wonderful support from our colleagues in the Evangelical Lutheran Church in America and from various staff members, particularly our ethnic missioners and The Rev. Tom Brackett. While we all

found this to be a greater challenge than meeting in person, we grew increasingly able to work through this medium during the course of the triennium, and were thus able to use our in-person gatherings for attending to other business.

This was a very productive triennium for our Committee, with exciting new initiatives and new ways of doing business that place a greater emphasis on networking and collaboration.

In general, our Committee places less emphasis on legislation than do other Joint Standing Committees, because our primary focus is the life and work of local congregations, and much of what happens on the local level should not be legislated at the church-wide level. Our focus is instead on networking, partnership, and facilitating the building of relationships. As part of this commitment, we covenanted together as a committee to engage in continued formation around anti-racism at each of our meetings. We also placed a strong emphasis on listening to and learning from our staff liaisons, the other committees of the Executive Council, and our ecumenical partners.

The members of the Committee benefited from strong collaborative relationships with the other committees of the Executive Council as well as with staff. During the triennium, we held joint meetings on areas of common concern with the Joint Standing Committees on World Mission and Advocacy and Networking for Mission, and also with the Standing Commission on Mission and Evangelism. We worked closely with the Joint Standing Committee on Finances for Mission on the new budget visioning process and on support for the Episcopal Church in Navajoland.

#### **Mission Enterprise Zones and New Church Starts**

Much of our work this triennium involved reading applications and entering into discernment with those who had applied for financial support through the new program of matching funds for new church starts and “mission enterprise zones” — new and often experimental ministries with groups that tend to be underrepresented in our current institutional structures. This new initiative, authorized by General Convention 2012 in Resolution A073, was a great privilege to work on, as at every meeting we were able to see concrete examples of the visionary work that so many members of The Episcopal Church are engaging in at the local level. As the discernment process surrounding these applications continued, we realized that we wanted to move away from thinking of these simply as grants, and to instead view them as opportunities for ongoing partnership, relationship, and mutual learning.

In all, we were able to partner with 38 new ministries, which substantially increased the number of new worshipping communities that The Episcopal Church has supported this triennium in comparison with recent triennia. It is our hope that the General Convention will decide to continue funding for this new initiative over the course of the next triennium, as it seems to us that the momentum around this is still building, and there are so many interesting new ministries that are worthy of our Church’s support.

#### **Constable Grants**

Constable Grants are also awarded through our Committee. The Constable Fund provides grants to fund mission initiatives that were not provided for within the budget of the General Convention/Domestic and Foreign Missionary Society (DFMS).

This triennium, we continued the widening of the eligibility requirements for Constable Grants from 2009-2012. Those eligible to apply for Constable funding include programmatic offices of the Domestic and Foreign Missionary Society, one of the Standing Committees, Commissions, Agencies, or Boards (CCABs) of the General Convention, and Provinces of the Episcopal Church.

At the June 2013 meeting, we awarded 7 grants, out of a total of 22 applications received — more applications than had ever previously been received. At our February 2014 meeting, we were able to award 8

grants, out of 19 applications. At the time this report was submitted, the review of 15 applications for the 2015 grants was beginning.

### **Jubilee Centers**

A further way in which we are able to uphold the ministry of local congregations is through the recognition and affirmation of new Jubilee Centers, which we do at every meeting of the Executive Council. Jubilee Centers are ministries that empower the poor and oppressed in their communities by providing direct services such as food, shelter, and health care; and also by advocating for human rights. As part of our work with recognizing Jubilee Centers, we had a productive meeting with the new Domestic Poverty Missioner, The Rev. Canon Mark Stevenson, about ways in which staff, local congregations, and the Executive Council can appropriately partner together for this work.

### **2016-2018 Budget Process**

We also spent considerable effort on the new budget visioning process this triennium, with excellent leadership from the Joint Standing Committee on Finances for Mission. In comparison with past trienniums, we began the budgeting process much earlier in the triennium. Our committee spent time looking carefully at the budget line items that corresponded to our work; and made recommendations about what areas should be adjusted, what might be cut, and what new initiatives might be worth trying. We discussed proposals such as funding for clergy and lay leaders to increase their fluency in foreign languages, and new initiatives to forgive educational debt for seminarians willing to serve for a period of time in low-paying ministries deemed high priority by The Episcopal Church.

### **Other Business**

In addition to A073, three other resolutions were referred to our Committee by General Convention 2012.

- **Resolution A144**, to monitor the ratio of women and other underrepresented groups that are nominated and elected to the episcopate, was passed but unfunded. The Office of Pastoral Development has worked to address the issues raised in the resolution this triennium.
- **Resolution A076**, on strengthening small congregations, was referred to each of the five Joint Standing Committees of Executive Council. We tried to keep the needs and concerns of small congregations in mind throughout our work together, and we were able to support a gathering on ministry in small congregations through a Constable Grant.
- **Resolution 161**, to amend the mandate and membership of the Executive Council Committee on Anti-Racism, was re-referred to the Joint Standing Committee for Advocacy and Networking for Mission, through which the Executive Council Committee on Anti-Racism reports.

As the triennium drew to a close, we considered the reports of those standing commissions that report to us, and we began to brainstorm resolutions in areas that other committees and standing commissions do not seem to be addressing, including possible reforms to the ordination process and the General Board of Examining Chaplains.

We are thankful for having been entrusted with the opportunity to serve the Church through this ministry, and for the spirit of openness, collaboration, flexibility, and trust that has characterized our work together this triennium.



## EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON WORLD MISSION

### Membership

Ms. Martha Gardner, *Chair*  
Ms. Karen Longenecker, *Vice Chair*  
The Rev. Dr. Stan Runnels, *Secretary*  
The Rev. Brian Cole  
The Rt. Rev. Clifton Daniel  
The Rev. Dahn Gandell  
The Rev. Stephen Herr, *Evangelical Lutheran Church of America*  
The Rev. Canon Cristóbal León Lozano  
The Rev. Nathaniel Pierce  
The Very Rev. Peter Wall, *Anglican Church of Canada*  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*

The members of World Mission include members from the junior and senior classes of Executive Council, with terms expiring in both 2015 and 2018. During this triennium, Spanish interpretation was present at all meetings to facilitate interpretation on behalf of The Rev. Cristóbal León Lozano, who is a Canon from the Diocese of Ecuador Litoral.

The Rev. David Copley, the Officer for Mission Personnel in the office of Global Partnerships, serves as the staff liaison to the Committee for the purposes of providing information and background to inform the Committee's work in the area of global partnerships and global mission work. The Rev. Margaret Rose, Deputy for Ecumenical and Interfaith Collaboration, also provided regular reports to the Committee on developments pertaining to the Church's growing work of interfaith collaboration.

The Rev. Canon C. K. (Chuck) Robertson, PhD, also provided ongoing reports to the Committee on issues relating to the Church's relationship within the Anglican Communion. Ms. Elizabeth Lowell, Program Director for the Development Office of The Episcopal Church, also joined the Committee to provide reports and discuss the progress of the rebuilding efforts in the Diocese of Haiti. Dr. Rob Radtke, President of Episcopal Relief and Development, also joined the Committee to report on the critical work of Episcopal Relief and Development in developing areas of the world.

### Summary of Work

**Mandate:** To help Executive Council highlight issues beyond the United States (including in Provinces II and IX) that call for the Church's discipleship and mission. Special concerns include inter-Anglican relations, sending and receiving missionaries, the Millennium Development Goals, the Church's overseas dioceses, educational opportunities in the Caribbean and Latin America, the Anglican Covenant, rebuilding Haiti, and the United Thank Offering.

**Meetings:** This triennium brought a new spirit of collaboration, cross-fertilization, and networking to the work of World Mission — work that included joint sessions with other committees of Executive Council at every meeting to collaborate on overarching issues to create a more comprehensive and cohesive board response. Collaborative work brought forth a thoughtful, deliberate, and intentional approach of partnership to work spanning the global reach of The Episcopal Church.

The Committee spent considerable time at each meeting discussing the budget process, budget changes and forecasts, and best ways to allocate resources. We are thankful for the courageous leadership of the Budget Committee from the Executive Council Joint Standing Committee on Finances for Mission. Following a continuous and broad-reaching budget process throughout the triennium has kept significant and crucial attention on the fiduciary responsibilities of the Board.

The budget of World Mission falls under Marks I, II, and III of the Five Marks of Mission. Mark I is to “Proclaim the Good News.” Mark II states, “To teach, baptize and nurture new believers”; and Mark III states, “To respond to human need by loving service.”

The Five Marks of Mission were developed by the Anglican Consultative Council between 1984 and 1990 and updated in 2012, and have been utilized within the Anglican Communion and among parishes and dioceses in The Episcopal Church since General Convention adopted them in 2009. They form a framework for mission activities. Using the framework of the Five Marks of Mission, World Mission focused this triennium on eight major areas of work:

1. Global Missions and Missionaries, specifically Young Adult Service Corps & Episcopal Volunteers for Mission
2. Covenant Committees and Bilateral Relationships
3. The Episcopal Church in Haiti
4. Sustainability in Province IX
5. Ecumenical and Interreligious Relations
6. Anglican Communion Relations
7. The Episcopal Church and the United Nations
8. The United Thank Offering

*1. Global Missions and Missionaries, Young Adult Service Corps (YASC), and Episcopal Volunteers for Mission*  
World Mission dedicated significant time this triennium to hearing and developing the crucial work of Global Missions in The Episcopal Church. This includes supporting programs like YASC for young adults representing The Episcopal Church throughout the globe; and a similar program, Episcopal Volunteers for Mission, for older adults.

Germane to the work of the Board is hearing how these programs improve global relationships in and outside The Episcopal Church, as well as providing financial oversight and support for ongoing resources.

*2. Covenant Committees*

World Mission also spent considerable time discussing the Covenant Committees within The Episcopal Church — IARCA (Anglican Church of the Region of Central America, composed of the Dioceses of Guatemala, El Salvador, Nicaragua, Costa Rica, and Panama), Liberia, and Mexico, as well as the bilateral relationships with Brazil and the Philippines. Specific to the work of the Committee was ongoing discussion regarding the need for continued relationship and network building; best practices for faithful relationship models; and responsibilities and accountability for Covenant Committee members, including extensive conversation regarding continued financial resources. A corresponding resolution regarding reporting structure is attached.

*3. The Episcopal Church in Haiti*

World Mission was heavily involved in the work of rebuilding following the earthquake in 2010 in Haiti — work that will most likely continue for several triennia. We are pleased to be involved in the rebuilding of one of the largest Episcopal dioceses in the world during its persistent and dedicated work to recover from the devastation. Five years later, there is still much work to be done at a church-wide level and at individual and parish levels.

#### 4. Sustainability in Province IX

World Mission, in collaboration with the Mission Department and the Global Partnership staff, implemented a comprehensive plan this triennium to support sustainability in Province IX. The comprehensive plan includes working with individual dioceses to support existing financial resources, addressing challenges, and planning for future financial self-sustainability. With approval from a committee of leaders in Province IX, this plan was implemented and is already showing signs of progress. This plan will be pertinent to the work of World Mission at least through 2018. A corresponding resolution supporting the ongoing work in this regard is attached.

#### 5. Ecumenical and Interreligious

World Mission has also supported the work of ecumenical relations and interreligious relationship throughout our work this triennium. In addition, Interreligious Relations has highlighted exciting new areas of work such as Muslim-Christian partnership efforts and the Interfaith Middle East Pilgrimage as directed by General Convention. Two corresponding resolutions are attached, highlighting significant movement and progress in dialogue with our ecumenical partners as well as with our interfaith partners.

#### 6. Anglican Communion Relations

Specifically pertinent to this triennium was our relationship within the Anglican Communion with the enthronement of the new Archbishop of Canterbury. The Committee specifically wishes to recognize intentional efforts on the part of this Church in strengthening relationships throughout the Communion. A corresponding resolution supporting the ongoing work of the Inter-Anglican Secretariat is attached.

#### 7. The Episcopal Church and The United Nations

Ecumenical relations also allow us to celebrate the achievement of obtaining official status on the Economic and Social Council (ECOSOC) of the United Nations. Continued collaboration on issues in front of the United Nations is an important aspect of work of The Episcopal Church as well as for World Mission. A resolution in affirmation of this work, and to support continued work of the Church at the United Nations, is attached.

#### 8. United Thank Offering

The United Thank Offering reflects the spirit of global mission in The Episcopal Church, our continued dedication to mission work, and the generosity of Episcopalians with blue boxes everywhere. World Mission is especially thankful for the United Thank Offering Board, for its time and dedication to this work, and for the church-wide staff for their help in collaboration. As the United Thank Offering has undergone many significant changes during the past triennium, World Mission is grateful for the continued collaboration regarding the use of our deep resources and the broad reach of the UTO. An ongoing partnership between World Mission and the UTO will be a significant priority in the next triennium.

In recognition of his important participation, The Rev. Canon Cristóbal León Lozano — a Province IX Council member from the Diocese of Ecuador Litoral who has faced the extra language challenge of our English-centric meetings — was asked to prepare a report of his participation on World Mission in his own words, which follow and are translated into English:

*Como representante clerical de la IX Provincia, estoy terminando mi periodo en el Consejo Ejecutivo y tengo que dar gracias a Dios por la oportunidad de servir a la Iglesia desde esta función, la cual ha sido muy enriquecedora en la visión Pastoral de la Iglesia.*

*El Consejo Ejecutivo ha sido un medio a través del cual el Gobierno de la Iglesia se ha manifestado sobre muchos asuntos muy importantes para el desarrollo pastoral de la Misión, respondiendo así a la Característica de la Iglesia Episcopal, “una Iglesia inclusiva.”*

*El trabajo desarrollado hasta ahora ha sido muy fuerte, queriendo cumplir con los mandatos de la Convención general.*

*En este segundo trienio he sido parte del Comité de Misión Mundial y una de las acciones que hemos desarrollado es el acompañamiento a la IX Provincia para poder hacer un Plan de autosostenibilidad. Por ser un paso muy importante ha sido necesario programar varias reuniones y esperamos que la Iglesia Episcopal y sus comités, agencias y redes puedan ser un buen soporte para culminar con metas claras este proceso.*

*Gracias a todos y todas quienes hicieron posible que mi participación fuera lo más objetiva.*

*Fielmente en Cristo.*

**Rev. Canon Cristóbal León Lozano,  
Representante clerical IX Provincia**

As a clergy representative from Province IX, I am finishing my time on Executive Council and I have to give thanks to God for the opportunity to serve the Church in this function, which has been very enriching in the pastoral vision of the Church.

Executive Council has been a means through which the government of the Church has manifested itself on many very important issues for the pastoral development of the Mission of the Church, responding to the characteristic of the Episcopal Church as “an inclusive church.”

The work developed to this point has been very strong, desiring to carry out the mandates of The General Convention.

During the second triennium I have been a member of the Executive Council Joint Standing Committee on World Mission. One of the issues we have been developing is the elements for a plan for Province IX to work toward self-sustainability. With this being a very important step, it has been necessary to plan several meetings, and we hope that The Episcopal Church and its committees, agencies, boards, and networks will be able to continue to be a positive support in order to reach the goals we have clearly outlined in this process.

Thank you to everyone who has made my participation possible.

Faithfully in Christ,

**Reverend Canon Cristóbal León Lozano  
Clergy Representative from Province IX**

As The Episcopal Church, Executive Council, and World Mission prepare for General Convention in the summer of 2015, several important lessons from this triennium could inform our work together. We have learned that collaboration, partnership, patience, and networking make us a healthier body as a Board and, more importantly, as a *global* church.

We have learned that indeed, there is no such thing as a “national church”; we are all members of a very global body of Christ. We have learned that the work of World Mission is work that has no ending; it involves lifelong relationships all over the world that are allowed to be expressed in new and different models. To this point, how can we aim toward being a church that uses *relationship* as our most powerful resource?

## REPORT ON RESOLUTIONS REFERRED TO DIOCESES

Of 109 reporting jurisdictions, 31 dioceses responded to resolutions referred for action or consideration after the 77th General Convention, as recorded below:

Resolutions Referred for Action or Consideration		Action	No Action
<b>A025</b>	Challenge Congregations to Have a Website	15	16
<b>A035</b>	Reaffirm Commitment to Interreligious Engagement	12	19
<b>A037</b>	Commend Guidelines for Ecumenical Shared Ministries	8	23
<b>A049</b>	Authorize Liturgical Resources for Blessing Same-Sex Relationships	14	17
<b>A073</b>	Establish Diocesan Mission Enterprise Zones	11	20
<b>A096</b>	Reduce Financial Barriers to Member Participation	12	19
<b>A125</b>	Recommit to Anti-Racism Work	14	17
<b>A127</b>	Recommit to Anti-Racism Work	15	16
<b>A128</b>	Examine Impact of Doctrine of Discovery	7	24
<b>A131</b>	Express Solidarity with Indigenous Peoples	10	21
<b>A139</b>	Endorse Efforts Against Gender Violence	11	20
<b>A140</b>	Advocate for Maternal and Infant Health	10	21
<b>D003</b>	Declare Church Sites as Gun-Free Zones	11	20
<b>D022</b>	Respond to Bullying	11	20
<b>D050</b>	Encourage Clergy Response to Poverty and Justice	11	20
<b>D067</b>	Support the DREAM Act	9	22
<b>D069</b>	Engage in Social Media	14	17

Resolutions Referred for Consideration or Information		Action	No Action
<b>A012</b>	Urge Governments to Follow Principles in Adopting Trade Policies	10	21
<b>A016</b>	Affirm the Moral Responsibility to Protect Populations from Atrocities	6	24
<b>A019</b>	Continue Advocacy and Efforts for Peace in Sudan	12	19
<b>A046</b>	Commend the Ministry of Lifelong Christian Formation	15	16
<b>A051</b>	Continue Trial Use of Holy Women, Holy Men	14	17
<b>A054</b>	Authorize Rites for Care of Animals	9	22
<b>A057</b>	Authorize Enriching Our Worship	13	18
<b>A079</b>	Urge Defense of Human Rights and Communities Unduly Affected	10	21
<b>A088</b>	Set Expectations for Steward Leaders	11	20
<b>A113</b>	Commend Work of Missionaries	11	20
<b>A132</b>	Protect Indigenous Peoples' Sacred Sites	10	21
<b>A136</b>	Affirm the Compatibility of Science and Christian Faith	13	18
<b>A161</b>	Amend the Anti-Racism Committee's Mandate and Appointments	7	24
<b>A165</b>	Affirm HIV and AIDS Ministry and Health Education	11	20
<b>A166</b>	Participate in Prayer Week for AIDS Healing	10	21
<b>B009</b>	Authorize Use of 1979 Lectionary	13	18
<b>B017</b>	Support for Al Ahli Hospital in Gaza	8	23
<b>B019</b>	Support Israeli-Palestinian Peace	11	20
<b>B023</b>	Seek Environmental Justice	12	19
<b>C033</b>	Support Voting Rights and Representation for the District of Columbia	6	25
<b>C075</b>	Commit to Welcoming the Sudanese	10	21
<b>C077</b>	Condemn Wage Theft and Affirm Ethics in Convention Site Selection	9	22
<b>C083</b>	Invite Members and Other People to Read the Bible	12	19

<b>Resolutions Referred for Consideration or Information</b>		<b>Action</b>	<b>No Action</b>
<b>C119</b>	Support Legislation to Improve Port Conditions and Workers' Rights	8	23
<b>Do08</b>	Reaffirm Commitment to and Participation in the Anglican Communion	12	19
<b>Do11</b>	Urge Equal Application of Immigration Law to Same-Sex Partners	14	17
<b>Do28</b>	Support the Labor Movement	9	22
<b>Do55</b>	Advocate for Reducing Climate-Changing Emissions	12	19

## 78TH GENERAL CONVENTION RESOLUTIONS APPROVED BY EXECUTIVE COUNCIL

### **A011: RECOMMIT TO CRIMINAL JUSTICE REFORM STUDY AND ADVOCACY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention reaffirm and renew the Church's longstanding commitment to the evaluation and reform of the federal, state, and local criminal and juvenile justice systems in the United States, as previously called for by General Convention resolutions 1985-C043 (Create a Task Force on Reform of the Criminal Justice System), 2000-B055 (Reaffirm Criminal Justice System Reform), 2003-B026 (Establish the Joint Committee on Criminal Justice), 2006-A111 (Investigate Criminal Justice Issues), and 2012-D026 (Urge Support for Bipartisan U.S. Commission on Criminal Justice); and be it further

*Resolved*, That the 78th General Convention declare support and advocate for the expansion of funding for treatment, alternatives to incarceration, and reintegration services to people leaving prison; and call on Episcopalians to support and participate in mentoring and accompaniment programs for those leaving prison; and be it further

*Resolved*, That the 78th General Convention declare opposition to mass incarceration, which perpetuates a cycle of systemic poverty in the United States through its impact on defendants, inmates, parolees, and their families; and be it further

*Resolved*, That the 78th General Convention reaffirm and renew the call of The Episcopal Church for a moratorium on the use of for-profit private prisons, including immigration detention centers, which often set occupancy or "bed" quotas, capitalizing on the criminal, civil, and immigration incarceration of individuals; are a leading factor in the "New Jim Crow," the disproportionate mass incarceration of youth and men and women who are black and brown; and feed the "School to Prison Pipeline," which depends on the use of school policing and mandatory sentencing for non-violent crimes; and be it further

*Resolved*, That the 78th General Convention reaffirm and renew support for the repeal of mandatory-minimum sentences for nonviolent offenses; and be it further

*Resolved*, That the 78th General Convention call for the abolition of the sentencing disparity between crack-cocaine and powder-cocaine offenses; and, as an intermediate step, urge the U.S. Congress, in accordance with the recommendation of the U.S. Sentencing Commission, to make retroactive the 2010 Fair Sentencing Act, which reduces the disparity in sentencing from previous levels; and be it further

*Resolved*, That the 78th General Convention urge states with monetary bail bond systems to reform those systems, which rely upon often-unlicensed and unregulated bail bond agents and on conditioning release from pre-trial incarceration solely on the ability to pay, discriminating against defendants who are poor; and be it further



*Resolved*, That the 78th General Convention, acknowledging the importance of employment for reintegration into society by formerly incarcerated persons, urge policymakers to pursue legal reforms to enhance the employability of people leaving prisons; and be it further

*Resolved*, That the 78th General Convention condemn offender-funded law enforcement practices, such as requiring newly released inmates to pay for their own court-required drug testing when they often are unemployed or underemployed, and urge policymakers to create equitable post-sentencing parole systems that remove undue financial burden on the parolee as a condition for maintaining parole; and be it further

*Resolved*, That the 78th General Convention condemn the practice by many states of felon disenfranchisement, which removes the right of formerly incarcerated (or "returning citizens") to regain the right to vote once they complete their sentence and leave prison; and be it further

*Resolved*, That the 78th General Convention call for exploration and creation of restorative justice programs to transform juvenile justice systems; and be it further

*Resolved*, That the 78th General Convention direct the Executive Council to convene a Criminal Justice Reform Coordinating Committee, comprised of church members, ecumenical partners, and outside experts, for the purpose of developing educational information, advocacy tools, and church policy to assist the dioceses and church members in their ministry to prisoners, people returning home from prisons, and their families; and in their advocacy for comprehensive criminal justice reform at all levels of government; and to direct the Coordinating Committee to report to the 79th General Convention; and be it further

*Resolved*, That the 78th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget to support the work of such Criminal Justice Reform Coordinating Committee.

**EXPLANATION**

This resolution calls the Church to renew its commitment to Criminal Justice Reform and to form a Criminal Justice Reform Coordinating Committee, organized by and reporting to the Executive Council, to develop an educational toolkit and advocacy measures for church members and church policy.

Comprehensive criminal justice reform is a complex subject with many components at the federal, state, and local levels of government that intersect with the ministry and advocacy of The Episcopal Church in its focus on the Marks of Mission, especially Marks 3 and 4 (To respond to human need by loving service; and To seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation). The General Convention has long committed the Church to work on criminal justice reform, and it is timely to do this work in concert with our partners.

Many of the reforms specified in this resolution have been addressed in prior General Convention and Executive Council resolutions. A few of the items bear more explication below.

Legal scholar Michelle Alexander's book, *The New Jim Crow: Mass Incarceration in an Age of Colorblindness*, published in 2010, "presents the disturbing realities of mass incarceration in the United States and its damaging effects on both the families of the incarcerated and on society as a whole. The United States currently has approximately 2.3 million individuals in prison, up from fewer than 350,000 in 1972, more than half of whom are in jail for non-violent crimes. Proportionately, the United States has the most jailed

individuals in the world. With less than 5 percent of the global population, the United States holds almost 25 percent of the world's prisoners." [*Religion & Politics* article, "The New Jim Crow: Churches Respond to Mass Incarceration," by Alfredo Garcia, August 13, 2013]

Congress passed the Fair Sentencing Act (FSA) in 2010, reducing the sentencing inequality for crack, used mostly by poor defendants, and for powder cocaine, used mostly by affluent defendants, from 100:1 to 18:1. Because the majority arrested for crack offenses are African American, the 100:1 ratio resulted in vast racial inequality in sentences for comparable offenses. The FSA represents a decade-long, bipartisan effort to reduce the racial disparities caused by crack cocaine sentencing laws. In 2011, the U.S. Sentencing Commission voted to apply the new sentencing guidelines to individuals sentenced before the law's enactment, and the U.S. Supreme Court will decide whether or not to accept the retroactive application, which could mean that more than 12,000 people, 85 percent of them African-Americans, have their sentences for crack cocaine offenses possibly reduced by a federal judge.

The New Jersey State Commission on Investigation in a May 2014 report found that many bail bond agencies are operated without licenses by individuals with extensive criminal records. Because vast sums of money are involved, the Commission also discovered frequent cases of illegal and unethical practices leading to the release of dangerous individuals for fractions of their court-mandated bail amounts, unbeknownst to the courts. The imposition of bail also discriminates against those who are poor and without resources, such as equity in real estate, with which to post bail — leaving the poor, largely defendants of color to languish in pre-trial incarceration disproportionately.

Parolees frequently encounter barriers to finding employment and housing upon release from incarceration and are often required by court order to obtain drug testing at specified facilities for which they must pay out of their own funds. Many parole revocations that land formerly incarcerated persons back in incarceration are due to their inability to meet the financial terms of their parole, such as paying for drug testing, when they have also been unable to find employment. Some recidivism is due to being poor, rather than to repeating the offenses that caused the parolee's original incarceration.

Two sociology professors — Christopher Uggen of the University of Minnesota and Jeff Manza of New York University — published the book, *Locked Out: Felon Disenfranchisement and American Democracy* in 2006, in which the authors found that approximately 1 of 40 voting-age Americans can't vote due to a felony conviction. The numbers in states vary, because each state has different voting prohibition rules. For example, their most recent updated figures, as of December 2010, show 5.85 million disenfranchised nationally.

**A012: CONTINUE FUNDING OF MISSION ENTERPRISE ZONES**

Resolved, the House of \_\_\_\_\_ concurring, That the Church celebrate and further the good work initiated by GC2012-A073 Establish Diocesan Mission Enterprise Zones, defined as a geographic area, as a group of congregations or as an entire diocese committed to mission and evangelism that engages underrepresented groups, including youth and young adults, people of color, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement"; and be it further

Resolved, That the Church honors the holy experiments emerging throughout the Church — experiments that are building partnerships, expanding the language of ministry; creating new ways to engage the people of God; harvesting and sharing learnings; and lending courage to those leading new ministries and lowering the cost of failure; and be it further

*Resolved*, That the 78th General Convention continue to fund the startup of Mission Enterprise Zones and New Church Starts with a significantly increased budget allocation over the 2012-2015 budget; and be it further

*Resolved*, That the Church continue to develop the Mission-Centered Episcopalians web-based sharing platform and to bring together mission developers for a face-to-face gathering where they can share best practices, upholding ministry leader wellness; mutual guidance and support; and sharing of stories, resources, and prayer; and be it further

*Resolved*, That diocesan leaders be encouraged to share what they learn from these Mission Enterprise Zones specifically in the disciplines of a) financing and sustaining these experiments, b) adapting liturgical practices for increased missional impact, c) exploring new processes for mentoring and training emerging leaders *in situ*, and d) blessing our diocesan families by more readily incorporating these non-traditional faith communities with voice and vote as discerned by the leadership of that Mission Enterprise Zone or New Church Start; and be it further

*Resolved*, That applications for partnership and funding from these new ministries will be discerned, supported and called to accountability by a First Mark of Mission task force appointed by the Missionary Society and the Episcopal Church's Executive Council, with the seed money administered by the Church's Missioner for New Church Starts and Missional Initiatives, for the 2016-2018 triennium; and be it further

*Resolved*, That the 78th General Convention request that the Joint Standing Committee on Program, Budget, and Finance allocate not less than \$3M designated in the EC draft budget for 2016-18 to continue funding the startup of Mission Enterprise Zones and New Church Starts to implement this resolution during the 2016-2018 triennium.

EXPLANATION

The URL for the Mission-Centered web-based sharing platform is <http://www.mission-centered.org>.

**A013: CONTINUE FINANCIAL SUPPORT FOR GLOBAL MISSIONS, YOUNG ADULT SERVICE CORPS, AND EPISCOPAL VOLUNTEERS IN MISSION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirm the growing success of the work of Global Missions, especially the global networks, relationships, and spiritual developments seen in programs like the Young Adult Service Corps and the Episcopal Volunteers in Mission; and be it further

*Resolved*, That the 78th General Convention, in showing our continued support to be a mission-based church firmly grounded in the work of global mission, call upon Executive Council to work to increase the opportunities for global mission through such programs as Young Adult Service Corps and Episcopal Volunteers in Mission, through budgetary means as available so that opportunities for global mission are increased, diversified, and prioritized by the 79th General Convention; and be it further

*Resolved*, That the 78th General Convention call upon every diocese to explore the opportunities for global mission work and encourage as many people as possible to apply for, attend, and complete a mission assignment as made available by these programs.

**A014: CELEBRATE EPISCOPAL RELIEF & DEVELOPMENT’S 75 YEARS OF HEALING A HURTING WORLD**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church commend Episcopal Relief & Development for strengthening the bonds of Anglican unity by partnering with The Episcopal Church's Anglican and Episcopal counterparts in nearly 40 countries worldwide, and for utilizing local assets to best steward resources and encourage long-term and holistic change; and be it further

*Resolved*, That the 78th General Convention of The Episcopal Church encourages dioceses, congregations, and individuals to celebrate and support the life-saving work of Episcopal Relief & Development during this, their 75th year, and in years to come.

**A015: CONTINUE TO SUPPORT PROVINCE IX SUSTAINABILITY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirm the Church’s dedication for the ongoing work of Mark of Mission II — “To Teach, Baptize, and Nurture New Believers,” especially as it pertains to the agreed-upon plan for Province IX Sustainability; and be it further

*Resolved*, That plan adopted by the Project Team for the Second Mark of Mission, meeting in Santo Domingo, Dominican Republic from July 8-11, 2013 be continued and supported by the representation of the General Convention; and be it further

*Resolved*, That the Executive Council of the Episcopal Church, working through the Joint Standing Committee on World Mission, or through a similarly tasked representative body or committee of the Executive Council assigned to exert fiduciary responsibility for this crucial component of the ongoing mission of the Church in Province IX, continue to support the work of Province IX Sustainability in the 2016-2018 triennium as detailed in the plan adopted by Executive Council; and be it further

*Resolved*, That the Executive Council, Church management, and key leaders of bishops, clergy, and lay representatives from throughout Province IX continue to work together to implement this plan through such time as all dioceses in Province IX reach self-sustainability.

**A016: PROVIDE STRUCTURAL SUPPORT FOR COVENANT COMMITTEES**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention instruct the Covenant Committee and Bilateral Committee serving each of our global partners (Brazil, Philippines, Central America, Mexico, and Liberia) to submit to the Standing Commission on World Mission and the Executive Council Joint Standing Committee on World Mission, on an annual basis, a report reflecting the current status of work of the Covenant/Bilateral Committee, including actions and programs planned; implemented; or plans for future actions or programs, developments with regard to partnership priorities, financial challenges, and strategies for self-sustainability; and be it further

*Resolved*, That such reports be submitted no later than October 1 of each calendar year.

**EXPLANATION**

From its inception, The Episcopal Church has been a missionary church. Ever since we gained autonomy from the Church of England, Episcopalians have responded to Christ’s call, sharing the Gospel with people in North America, throughout Latin America and the Caribbean islands, and even reaching to Africa, Asia, and the Pacific Rim.

This missionary endeavor resulted in new churches, dioceses, and even provinces of the Anglican Communion. These provinces continue to be our key partners today, long after their independence from The Episcopal Church. Foundations in Liberia, the Philippines, Mexico, Brazil, and throughout Central America remain close to their roots in the Church.

To honor these partnerships, global covenants with financial provisions were created and signed together. These covenants provide support to help propel the new provinces into the future. Even though some of these agreements have fulfilled their financial commitments, our relationships of affection continue as we journey as equal partners.

The intent of this resolution is to ensure that those bodies of the Church charged with oversight and responsibility for these relations are annually informed of the activities and plans of each Covenant or Bilateral Committee.

**A017: AFFIRM ONGOING WORK AND DIALOGUE WITH ECUMENICAL BODIES**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirms the continuation of the ecumenical dialogues currently sponsored by The Episcopal Church, the Presbyterian Episcopal Dialogue, and noting particularly the renewed round of Anglican-Roman Catholic Theological Consultation in the U.S.A. (ARCUSA) dialogue and the work toward full communion with the United Methodist Church. The Committee also affirms the continued coordinating committee work with our full communion partners, The Evangelical Lutheran Church and The Moravian Church. The Committee also notes with joy and gratitude the deepening relationship between the Primates and Presiding Bishops of The Episcopal Church, The Evangelical Lutheran Church in America, The Anglican Church of Canada, and The Evangelical Lutheran Church in Canada; and commends, to members of all four churches, the work they have done together and the statements and study documents they have jointly issued.

**A018: ENCOURAGE INTERFAITH ENGAGEMENT**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirms the work being done on behalf of interfaith engagement by The Episcopal Church at all levels in the life of the Church, and encourages a sustained commitment to the furthering of such work. Recognizing the increasingly pluralistic nature of our world, we particularly cite the deepening of the Christian Jewish and Christian Muslim engagement as well as the broadening engagement with other religious traditions such as Hinduism, Buddhism, Sikhism, and others.

**A019: AFFIRM THE INTER-ANGLICAN SECRETARIAT**

*Resolved*, the House of \_\_\_\_\_ concurring, That through our funding and active participation, this Church continues to bear witness to this Church’s ongoing commitment to the Anglican Communion and the work of the Inter-Anglican Secretariat.

**A020: AFFIRM THE WORK OF THE EPISCOPAL CHURCH AT THE UNITED NATIONS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention and the Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the USA rejoice together in being granted Economic and Social Council consultative status at the United Nations; and be it further

*Resolved*, That the Church encourages all Episcopalians to educate themselves about the work of the United Nations and the many ways in which our collective call as Christians to “seek and serve Christ in all persons” links with the work undertaken at the United Nations, and to partner with the United Nations and its agencies to achieve these goals; and be it further

*Resolved*, That the 78th General Convention encourages all Episcopalians to avail themselves of the resources and opportunities presented by this status, in particular partnering with the Global Partnerships team and the Church's official representatives to the United Nations.

**A021: CONTINUE OUR COMMITMENT OF 0.7% OF THE MILLENNIUM DEVELOPMENT GOALS**

*Resolved*, the House of \_\_\_\_\_ concurring, That The Episcopal Church continues its commitment, especially as reflected in the church-wide budget, of the 0.7% dedicated to the Millennium Development Goals, or other such title as adopted by the United Nations (i.e., Post-2015 Development Agenda, or Sustainable Development Goals, as mentioned by the Economic and Social Council of the United Nations), throughout the 2016-2018 triennium and beyond; and be it further

*Resolved*, That the Convention, recognizing that funding for nutrition, education, health care, and development programs is essential to achieve not only the Millennium Development Goals, but also to recognize the dignity of all human beings, invites all dioceses and congregations to contribute 0.7% of their annual budgets to fund international development programs.

# EPISCOPAL NEWS SERVICE RESOURCE COUNCIL

## Membership

The Rev. James Richardson, *Convener*, 2015  
Ms. Veronica Dagher, 2015  
The Rev. Edgar Giraldo, 2015  
Ms. Nan Ross, 2015  
Mr. Mitch Sears, 2015  
Canon Jere Skipper, 2015  
Ms. Beckett Stokes, 2015  
Mr. Craig Wirth, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Mr. Matthew Davies, *Staff*  
Mrs. Anne Rudig, *Staff*  
The Rev. Mary Frances Schjonberg, *Staff*  
Ms. Lynette Wilson, *Staff*

## Summary of Work

**Mandate:** To engage with Episcopal News Service staff members about their newsgathering, distribution, creative, and publishing work. Episcopal News Service Resource Council members shall lend their experience, expertise, and perspectives to the ENS staff, with the goal of helping the Episcopal News Service in its efforts to serve effectively the needs of the Church at all levels (international, church-wide, diocesan, congregational) while keeping the voice of the whole Church in a prominent place in the operation of the news service.

**Meetings:** The ENS Resources Council met once, by conference call, and it has had no other meetings. The Council is in process of being organized.

# EXECUTIVE COUNCIL COMMITTEE ON ANTI-RACISM

## Membership

### *Provincial Representatives:*

Dr. Navita Cummings James, *Chair*, 2015; Southwest Florida, IV  
The Rev. Canon Dr. Angela Shepherd, *Vice Chair*, 2015; Maryland, III  
The Rev. Patricia Steagall-Sánchez Millard, *Secretary*, 2015; Oregon, VIII  
Ms. Carla Burns, 2015; New York, II  
Ms. Lelanda Lee, 2015; Colorado, VI  
The Rev. Cindy Nawrocki, 2015; Western Michigan, V  
The Honorable Cornelius Perry, 2015; Houston, VII  
The Rev. Ema Rosero-Nordalm, 2015; Massachusetts, I  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*, 2015  
The Rev. Gay Clark Jennings, *Ex Officio*, 2015  
Ms. Jane Cosby, *Executive Council Liaison*,  
*and Joint Standing Committee on Local Ministry and Mission*, 2015  
The Rev. Angela Ifill, *Staff Representative Missioner, Black Ministries*

The current composition of the Executive Council Committee on Anti-Racism (ECCAR) was created by General Convention Resolution 2012-A161. Each province was directed to select a representative from one of its dioceses to serve on the Committee. With the exception of Province IX, all provinces were represented. Additionally, a representative of the Executive Council Joint Standing Committee on Local Ministry and Mission was a mandated member, and together with the Missioner for Black Ministries, they were appointed as Executive Council and staff liaisons, respectively, to the committee. Only one member carried over from the previous triennium.

## Summary of Work

**Mandate:** To guide and monitor the Church's work in response to General Convention resolutions directed at eliminating the sin of racism from the life of the Church by overseeing and coordinating the efforts and activities for racial justice of The Episcopal Church (TEC), monitoring and evaluating anti-racism programming, recommending best practices for combating racism, collecting data on provincial activities to be submitted to Executive Council on an annual basis, developing criteria for the credentialing of certified anti-racism trainers, and monitoring compliance of anti-racism legislation passed by General Convention.

### **Reflecting Theologically: Anti-Racism Education as a Critical Part of Christian Formation and Church Leadership Development**

We have reflected on how important it is for the Church to understand that anti-racism theology and training should be a central part of both Christian Formation and the development of Church leadership. Theologically, the House of Bishop's pastoral letter entitled, "The Sin of Racism: A Call to Covenant" (March 2006) identified racism as sin, which General Convention affirmed in Resolution 1994-D136, calling the Church to recommit to combat racism through a new covenant. In the Church's U.S. dioceses, racism, indeed, has been identified as our "original" sin.

We believe that this sin of racism — in ways known and unknown — continues to manifest itself in our inability to understand that racism tears at the very core of our personal relationships with Jesus Christ and, to paraphrase Archbishop Desmond Tutu, at the very heart and soul of the United States. We believe racism is a problem that extends beyond the United States, and that it exists in various forms in non-U.S. dioceses.



We recommended in a “reimagined church” that clergy and laity continue to be required to receive anti-racism training (Resolution 2000-B049). We recognize that there have been many challenges to the Church’s follow-through with this General Convention mandate; however, such challenges neither negate the mandate nor the need for church leaders to receive anti-racism training. Rather, these challenges call the Church to do better. It is through a well-educated and -formed clergy and laity that The Episcopal Church will provide servant leaders to help congregations and local communities to “respect the dignity of every human being” and meet the objective of Mission Mark 4: “to seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation.”

### **Monitoring and Evaluating Major Church-Wide Anti-Racism and Social Justice Activities**

Over the past year and a half, the Committee and its members surveyed and participated in key church-wide efforts for racial justice — including an upcoming meeting in February 2015 with Episcopal clergy and others in Ferguson, Missouri concerning the August 9, 2014 police shooting of unarmed, Black teenager Michael Brown. These activities provided useful ways that help us gain insight into what is being done at the church-wide level, but it would be misleading to say the Committee “oversaw or coordinated” any of them.

- **Fifty Years Later: The State of Racism in America (November 2014)**

This two-day event held in Jackson, MS was proposed by Executive Council member Dr. Anita George. The first day included a live webcast to the Church. The second day was a face-to-face, on-site conference held in the Diocese of Mississippi. Both days included Civil Rights leaders and activists, leaders in The Episcopal Church, and scholars. ECCAR was involved in the planning of the second-day, on-site event, and committee members served as moderators and facilitators. Additionally, ECCAR offered a workshop, “Tools for Organizational Responses to Racism,” that included presentations on best practices by ECCAR committee members. Both the live webcast and the on-site conference were well received. Resources from this two-day conference are available on the Fifty Years Later: The State of Racism web page.

- **Interview Panel for Missioner on Racial Reconciliation (November 2013-June 2014)**

Two members of ECCAR served on the Interview Panel for the Missioner on Racial Reconciliation. In addition to hiring a Missioner for Racial Reconciliation, DFMS management also hired a Missioner for Social Justice and Advocacy Engagement from the pool of candidates to fill an open position that was reformulated (and was previously a Public Policy Engagement position).

- **Episcopal Divinity School (EDS) Absalom Jones Live Webcast — Dismantling Racism and Building Beloved Community: Sharing Hopes, Challenges, and New Visions (February 2014)**

*Traces of the Trade* workshop facilitators, Mr. Dain and Mrs. Constance Perry, worked with the Episcopal Divinity School and with Ms. Diane D’Souza to organize a live webcast. Their program included a panel of experts from across the country and who are involved in Episcopal Church anti-racism ministries. These experts joined a live audience in Boston via Google video conference. ECCAR was part of the web panel. Though there were weather challenges and some technical glitches, this program was an excellent prototype for future “cost-effective” uses of experts from multiple locations across the country to meet with live, on-site audiences during anti-racism programming.

- **The New Community Conference (March 2014)**

The New Community Conference is an ongoing project sponsored by the Office of Diversity, Social, and Environmental Ministries and brings together Black, Latino/a, Asian, Indigenous, and non-Hispanic white lay and clergy church leadership. Ms. Lelanda Lee, the Province VI member of the Committee, participated on the New Communities planning team. Navita Cummings James, the ECCAR Chair, presented workshop on the book, *The New Jim Crow: Mass Incarceration in the Age of Colorblindness*. Among the specific “racial justice” issues addressed during the conference was the “school-to-prison” pipeline in the United States.

- **Executive Council Conversation on Race, Racism, and Racial Justice (October 2014)**

For the October 2014 meeting, Ms. Lelanda Lee, ECCAR member and Chair of the Joint Standing Committee on Advocacy and Networking for Mission, coordinated a discussion that brought together leadership in the Church — staff and others — whose primary charges included race, anti-racism, racial justice, racial reconciliation, and racial restoration. Along with the chair of ECCAR, newly appointed Missioner for Racial Reconciliation Ms. Heidi Kim; and Missioner for Social Justice and Advocacy Engagement Mr. Charles Wynder, Jr. were part of this first-time conversation about their and other race-related ministries in the Church. The Chair and Missioners met with Executive Council Joint Standing Committees on Advocacy and Networking for Mission and Local Ministry and Mission.

- **TEC Anti-Racism Web Resources**

The Office of Communication has posted web resources related to anti-racism ministries, most notably the aforementioned resources from “Fifty Years Later: The State of Racism in America” conference. The Episcopal Archives offers resources that can be useful in anti-racism programming. We are anticipating that a revised Church anti-racism web page will be forthcoming soon.

Based on the above, the Committee reports that The Episcopal Church is active at the church-wide level in “racial justice” ministry. The Committee acknowledges that in the current triennium, Ethnic Missioners, including our Committee staff liaison, The Rev. Angela Ifill; the Office of Public Affairs; COO and Director of Mission, Bishop Stacy Sauls; The Diocese of Mississippi (host of “Fifty Years Later: The State of Racism in America”); the Episcopal Divinity School (host of the Absalom Jones event webcast on dismantling racism); the Executive Council; and other church officers, committees, and commissions are among those who have provided staff and resources to support the church-wide ministry of “racial justice.”

### **Monitoring and Evaluating Anti-Racism Training Certification Programming**

The Committee has begun its analysis of anti-racism certification and related programming in the Church, but this is a large undertaking. This process has included frank discussions about the strengths and weaknesses of the current Episcopal Church anti-racism certification training program, “Seeing the Face of God in Each Other”; and about problems using non-Episcopal Church training programs.

The Committee also addressed the interest of some dioceses and some in the larger Church in moving away from the language of “anti-racism” and instead focusing on “racial reconciliation,” “cultural competence,” and an understanding of “cultural diversity” and “multiculturalism.” We acknowledge that these approaches all are important and can be an indispensable part of both (1) clergy and lay Christian Formation and leadership development *and* (2) diocesan and provincial anti-racism related ministries. Most committee members agree, however, that any of these (racial reconciliation, cultural competency, cultural diversity, multiculturalism, etc.) as stand-alone programs are NOT anti-racism as mandated by General Convention.

Below we address the requirements we are considering using when we recommend that a program is acceptable for anti-racism training in The Episcopal Church, and we provide examples of current anti-racism programs being used for certification by dioceses.

- **Proposed Training Program Requirements**

The basic requirements the Committee is currently considering for a training program to be recommended for use in The Episcopal Church anti-racism certification or credentialing are:

- (a) A specified, required number of training hours that ordained and laypersons should complete;
- (b) Use of a *systematic* and *coherent* anti-racism training curriculum (e.g., “Seeing the Face of God in Each Other”);
- (c) Use of curricula that *directly* address racism and anti-racism within the training program;
- (d) Use of trainers trained in Episcopal Church-recommended or -approved “Train the Trainer” curricula;

(e) Recertification required every four years (cf. “Safeguarding All God’s People” recertification requirements)

- **Current Training Programs Used in The Episcopal Church**

The Episcopal Church has only endorsed for use in anti-racism certification training its own official program, but the Committee is aware that some dioceses are using other programs. There are concerns about how, if at all, some programs directly address racism and anti-racism. The certification training programs currently in use are:

- (a) “Seeing the Face of God in Each Other” (SFG). This is the official anti-racism training program.
- (b) “Seeing the Face of God in Each Other” (4th ed., 2010). This last version, for use by certified trainers only, might not have been widely distributed.
- (c) Other Train-the-Trainer and Anti-Racism Training Certification Programs. These include training programs — such as Crossroads, Kaleidoscope Institute, and Visions, Inc. — offered by other organizations.

### **Monitoring and Evaluating General Anti-Racism and Anti-Racism-Related Programming and Worship**

The Committee places in a separate category non-certification programming and activities:

- **Anti-Racism-Related Instructional Programming and Workshops**

As illustrated in “best practices” and in many of the church-wide activities described in this report, the Committee acknowledges and endorses varied programming strategies that encourage thought and dialogue about race, racism, anti-racism, racial justice, racial reconciliation, and other related concepts. We caution, however, that one-to-three-hour informational workshops and programs that are not a part of a coherent curriculum normally should not be used to meet the General Convention mandate of anti-racism training and certification.

- **Racial Reconciliation and Repentance Services**

The Committee encourages the use of liturgies and worship as a vital part of anti-racism ministry. One such example is the 2008 Episcopal Church “Day of Repentance” service held at The African Episcopal Church of St. Thomas in Philadelphia, in part to atone for the sins of racism and slavery in which The Episcopal Church was complicit (see The Episcopal Archives for a copy of the service).

As encouraged by Resolution 2009-A143, individual dioceses have held services to atone for these sins or to focus on healing the pain caused by racial injustices and the Doctrine of Discovery (see Resolution 2012-A128). Additionally, we are aware that some dioceses and churches have held racial reconciliation services specifically addressing the Church’s direct or indirect relationship with Native Americans and descendants of Mexican, Chinese, and Japanese heritage, all of whom at one time were exploited during the U.S. westward movement.

### **Developing a Bank of Best Practices for Eliminating Racism**

The Committee agrees that providing anti-racism “best practices” for the Church is a desirable objective, and we are identifying such practices. We do have concerns about how to make that information available to the Church and are considering how to use the upcoming, revised Anti-Racism web page for this purpose.

Currently, we are structuring our collection of best practices in two categories: those used in certification training or credentialing and those used for informational purposes. Examples of the Anti-Racism Certification Training (ARCT) include dioceses having annually scheduled training workshops (8-20 hours); dioceses collaborating together to seek funding and offer joint trainings; dioceses’ expanding units in The Episcopal Church curriculum, “Seeing the Face of God in Each Other,” as warranted by the needs of specific populations within a diocese (e.g., internalized oppression); and dioceses’ adding content to their certification curricula to address the General Convention resolutions on the “Doctrine of Discovery.”

The latter category of best practices, Anti-Racism Related Programming (ARRP), includes utilizing films and documentaries to generate conversations — e.g., *Traces of the Trade*; book discussions utilizing bestsellers such as *The New Jim Crow: Mass Incarceration in the Age of Colorblindness* (2010/2012) by Michelle Alexander;

YouTube conversation-starters, such as “What Kind of Asian are You?” and “How to Tell Someone They Sound Racist”; and targeted, anti-racism, informational, one-three-hour workshops for vestries, diocesan and parish search committees, youth groups, and more.

**Surveying the State of Anti-Racism (Ministries) in the Provinces and the Church**

The Committee determined that the best way to ascertain the current status of anti-racism ministries in The Episcopal Church is to conduct a thorough survey of the dioceses and provinces of TEC to get baseline data and to gain an understanding of how provinces and dioceses have been enacting anti-racism certification training and ministries since the closing of the Office of Social Justice. Current plans are to administer a survey, modeled on one previously used by Province III, to dioceses in January/February 2015. As with many other recent church surveys, the anti-racism diocesan survey will be administered through Survey Monkey. Survey results will be shared with the Executive Council in early 2015. Plans are also to post results on the Church’s revised Anti-Racism web page.

**Developing Criteria for the Credentialing of Certified Anti-Racism Trainers**

The mandate on credentialing trainers is necessarily linked to what is required in anti-racism training for ordained persons and lay leadership (see above). We are interested in knowing how dioceses and diocesan bishops view the certification requirement of anti-racism trainers.

Recommendations for credentialing anti-racism trainers currently being considered are:

- (a) Credentialed trainers should undergo a minimum number of hours of training.
- (b) Credentialed trainers should be trained in an approved anti-racism curriculum or curricula.
- (c) Credentialed trainers should receive facilitation training.
- (d) Credential trainers who are trained in non-Episcopal anti-racism approved curriculum may be required to take an additional three-six hours of training on Episcopal Church anti-racism theology, church history, and practice.
- (e) Credentialed trainers should “stay current” on anti-racism-related, church-wide, and societal trends and issues.
- (f) Trainers trained in The Episcopal SFG curriculum should be “grandfathered” and credentialed current as of 2015.

Relatedly, there is no current, central list of certified trainers in The Episcopal Church. There was no record of how long certification was intended to last or when recertification should begin. Our Committee is essentially starting over with identifying the existing and available Episcopal Church-certified trainers. Similarly, we are working on developing criteria for certification and recertification. Determinations must also be made about when and how to accept persons who have been trained in non-Episcopal Church, race-related training programs. Finally, we have concerns about how, once populated, this list of trainers should be maintained and made available within the Church.

**Monitoring Compliance of Anti-Racism Legislation Passed by General Convention**

Part of our strategy for monitoring compliance is first educating ourselves and the Church on what this body of legislation is, and then making that legislation easily accessible. Our initial search of the Episcopal Archives resulted in the identification of a minimum of 58 racism and anti-racism General Convention Resolutions passed since 1976. We know that there are more. Our Committee is in the process of preparing a coherent presentation of all anti-racism resolutions. Once completed, we plan to post these on the revised Episcopal Church Anti-Racism web page.

We are currently beginning to track dioceses’ compliance with resolutions that require or encourage the formation of anti-racism committees and resolutions that require ordained persons and lay leadership to have undergone and been certified as completing mandated anti-racism training.

**PROPOSED RESOLUTIONS**

AO22: AMEND MANDATE AND MEMBERSHIP OF THE EXECUTIVE COUNCIL COMMITTEE ON ANTI-RACISM

Resolved, the House of \_\_\_\_\_ concurring, That the mandate and membership for the Executive Council Committee on Anti-Racism is hereby amended to read as follows:

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

Recognizing and developing its anti-racism work as a fundamental and requisite part of Christian formation; monitoring and evaluating anti-racism and anti-racism related ministries and programming of The Episcopal Church and, when feasible, contributing to the oversight and coordination of said ministries and programming; recommending best practices for eliminating racism; collecting data on provincial anti-racism activities to be submitted to Executive Council on an annual basis; developing criteria for the credentialing of certified anti-racism trainers; and monitoring compliance of anti-racism legislation passed by General Convention.

Membership of the Executive Council Committee on Anti-Racism shall be composed of one person trained in anti-racism, named by the governing body of each province of this Church, plus one member of the Executive Council Joint Standing Committee on Advocacy and Networking for Mission and one Bishop.

(a) Each Committee member shall serve one triennium beginning January 1 in the year following each General Convention until the December 31 following the next General Convention. Members may be named to serve consecutive terms by their provinces.

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

(c) The Chair and Vice Chair of Executive Council shall appoint the member from the Joint Standing Committee on Advocacy and Networking, and the Chair shall appoint the Bishop member.

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

(e) To ensure representation of diverse racial and ethnic voices on this Committee, if there are no members named who are from the racial or ethnic groups of Black, Latino/a, Asian, Native American/Indigenous, and non-Hispanic White, then the Chair and Vice Chair of Executive Council shall appoint a member at large from each unrepresented racial or ethnic group.

**EXPLANATION**

The Executive Council Committee on Anti-Racism believes articulating the work of anti-racism to be a fundamental and requisite part of Christian Formation that honors our Baptismal Covenant to “seek and serve Christ in all persons, loving our neighbor as ourselves,” and lives into Anglican Mark of Mission 4 “to seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation.” Such an understanding of anti-racism work also strengthens the Church’s and our individual commitment to be anti-racists if we are, indeed, to be followers of Jesus Christ.

In the 2013-2015 triennium, the Executive Council Committee on Anti-Racism has performed work that is better characterized as “monitoring and evaluating” than as “overseeing and coordinating.” Oversight and coordination are normally tasks that require the presence of staff working with adequate budgets and are not tasks assigned to committees composed of volunteers without adequate budgets to carry out the work.

Racial justice is an aspirational concept of the world that we strive for while we do the work of interrupting and dismantling racism today. Both the name of the Committee and its actual work indicate that describing its work as “monitoring and evaluating anti-racism and anti-racism related ministries and programming” is accurate and factual.

This resolution serves to enhance the way the Committee was populated in the triennium 2013-2015, which was the first time the Executive Council Committee on Anti-Racism had been composed of members named as provincial representatives. Provincial representation has worked well for gathering information on the anti-racism work done throughout the Church. However, Province IX and the Native American/Indigenous group were not represented. Since the Committee’s work falls within the mandate of the Joint Standing Committee on Advocacy and Networking for Mission (with a focus on advocacy on the church-wide level: public policy, justice, and peacemaking; anti-racism; poverty; health care, public education; prisons; and care for the Earth), it would be more appropriate for a representative from that Committee to serve on the Anti-Racism committee for reporting and information-sharing purposes. Naming a Bishop to the Committee would enhance the theological work of the Committee to build upon the 1994 House of Bishops’ Pastoral Letter, “The Sin of Racism,” and the subsequent 2006 House of Bishops’ Pastoral Letter, “The Sin of Racism: A Call to Covenant.”

**A023: CONTINUE THE EXECUTIVE COUNCIL COMMITTEE ON ANTI-RACISM**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church continue the existence of the Executive Council Committee on Anti-Racism for another nine years; and be it further

*Resolved*, That the General Convention affirm the importance of the work of the Executive Council Committee on Anti-Racism to support the Church to live into existing General Convention resolutions mandating anti-racism training for clergy and lay leaders of the Church, which includes meeting in person to review, recommend, and endorse anti-racism curricula for use by the Church; and to plan and prepare for at least one church-wide “Train the Trainer” workshop in the next triennium; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation for the implementation of this resolution.

**EXPLANATION**

The Episcopal Church, through numerous General Convention resolutions dating back decades, has committed the Church to be anti-racist and to raise up anti-racists through anti-racism training and other formation activities. The Executive Council Committee on Anti-Racism has been steadfast since its inception in monitoring, evaluating, and supporting anti-racism and anti-racism-related ministries and programming of the Church; and in supporting compliance with General Convention anti-racism resolutions. Now is the time to reaffirm the Church’s commitment to making anti-racism work a fundamental part of the Church’s Christian Formation activities.

In the 2013-2015 triennium, the budget allocated to the committee was only \$2,000, which was insufficient to do any work that required an in-person meeting. Conversations on race, racism, and anti-racism are complex, nuanced, and unsuited to only web conference and teleconference communications. Allocation of a budget of \$30,000 would allow the Committee to conduct one Train the Trainer workshop and one in-person committee meeting to work on sorely needed curricula development.

**A024: DIRECT DIOCESES TO EXAMINE THE IMPACT OF THE DOCTRINE OF DISCOVERY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church, in accordance with our Baptismal Covenant and in the spirit of being inclusive, reaffirm and renew the directive to all dioceses, made by the 76th and 77th General Conventions, to examine the impact, including acts of racial discrimination, racial profiling, and other race-based acts of oppression, that the Doctrine of Discovery, as repudiated at the 76th General Convention, has had on all people, especially on people of color.

**EXPLANATION**

The Executive Council Committee on Anti-Racism calls for a renewed effort by dioceses to do this work of self-examination on the impact of the Doctrine of Discovery. Not all dioceses have engaged this work, and the need for learning, growing in faith, and repenting through the process of self-examination is as important today as when General Convention repudiated the Doctrine of Discovery in 2009 at the 76th General Convention. The Episcopal Church Native American/Indigenous leaders have taken this work to other groups, including to other churches and the United Nations, and it is important that the Church's dioceses also engage this work faithfully.

**Budget**

The Committee budget of \$2,000 for the current triennium does not cover the cost of any face-to-face meetings. Consequently, all meetings thus far have been held via teleconference. At the writing of this report, the Committee commits its \$2,000 budget to an attempt to have a face-to-face meeting in spring 2015. Additional funds are being sought from other sources. For the 2016-2018 triennium, ECCAR is requesting a minimum budget of \$30,000 for one face-to-face meeting; for a "Train the Trainer" workshop; and for resources to facilitate the reviewing, analyzing, and endorsing of anti-racism training curricula.

# EXECUTIVE COUNCIL COMMITTEE ON INDIGENOUS MINISTRIES

## Membership

Ms. Jasmine Bostock, *Chair*, 2015  
The Rt. Rev. Michael Smith, *Vice Chair*, 2015  
The Rev. Canon Mary Crist, *Secretary* (since 2014), 2018  
The Rev. Rachel Taber-Hamilton, *Secretary* (until 2014)  
Mr. Richard Ackley, 2018  
The Rt. Rev. David Bailey, 2015  
The Rev. Anna Frank, 2015  
Ms. Carmine Goodhouse, 2015  
Ms. LaCinda Hardy-Constant, 2018  
The Rt. Rev. Mark Lattime, 2015  
Mr. Frank Oberly, 2015  
The Rev. Eulogio Quito, 2018  
Ms. Wilma Standing Bear, 2015  
The Rt. Rev. John Tarrant, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. Canon John Floberg, *Executive Council Liaison*  
Ms. Sarah Eagle Heart, *Staff*

## Summary of Work

**Mandate:** To recommend policy to the General Convention and Executive Council, raising concerns of Native Americans and Indigenous peoples in other countries where The Episcopal Church is present: (1) help the church respond to the spiritual needs of Indigenous peoples in all countries where The Episcopal Church is present; (2) help the Church to combat racism as it uniquely affects Indigenous peoples in all countries where The Episcopal Church is present; (3) help the Church to respond to the violation of treaty rights of Indigenous peoples in all countries where The Episcopal Church is present; (4) and help the Church find a way to fund Indigenous ministries and ministries with Indigenous peoples.

The ECCIM continued its work, as referred to by the 77th General Convention, to “examine the impact of the Doctrine of Discovery.” Eight areas of interest were identified: (1) Leadership development, including pastoral skills, (2) Healing of social ills (such as alcoholism, domestic violence, and teen suicide), (3) Reconciliation (as with boarding schools), (4) Youth ministry, (5) Women’s ministry, (6) Indigenizing Christian worship space, (7) Advocacy and (8) Environmental concerns.

The Bishops’ Native Collaborative began to offer hybrid, online-residential courses such as, “A Christian Response to the Repudiation of the Doctrine of Discovery” and “Preaching and Praying the Scriptures.” The BNC also established partnerships with Episcopal Divinity School, Nashotah House Theological Seminary, Seminary of the Southwest through the Iona Initiative, the Diocese of Montana, Christ Church Cathedral of Cincinnati, and the Mission Enterprise Zones.

New Opportunity Grants for Native ministry were awarded to seven dioceses in the amount of \$75,000 per year for each year of the triennium. ECCIM conducted its work utilizing the Five Marks of Mission and the Baptismal Covenant.



**Meetings:** ECCIM met three times face-to-face during the triennium, including at the organizational meeting in St. Louis, MO; in Tulalip, WA; and in Salt Lake City, UT. These meetings were supplemented with five conference-call meetings.

**PROPOSED RESOLUTIONS**

The following resolutions are offered by ECCIM to the 78th General Convention:

**A025: SUPPORT NATIVE AMERICAN MINISTRIES ENGAGING AT-RISK TEENS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention authorize establishment of a rapid response to Episcopal Ministries that are engaged in intervention to prevent an ongoing crisis in communities such as teen pregnancies, gang violence, school drop-outs, (LGBT) suicides; and be it further

*Resolved*, That the Executive Council’s Committee on Indigenous Ministry’s Subcommittee on Adolescent Ministries develop and administer a support system and financial resources that the Church can provide to these local communities; and be it further

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

**EXPLANATION**

According to the U.S. Center for Disease Control and Prevention, suicide was the second leading cause of death for American Indian/Alaska Natives between the ages of 10 and 34 in 2009. American Indian/Alaska Natives are twice as likely to experience feelings of nervousness or restlessness as compared to non-Hispanic whites.

Violent deaths — unintentional injuries, homicide, and suicide — account for 75 percent of all mortality in the second decade of life for American Indian/Alaska Natives. While the overall death rate from suicide for American Indian/Alaska Natives is comparable to that of the white population, adolescent American Indian/Alaska Native females have death rates at almost four times the rate for white females in the same age groups.

Rates of HIV/AIDS and Sexually Transmitted Diseases are higher for American Indian/Alaska Natives than for the general population. Furthermore, in 2007, the preliminary birth rate for AI/AN teen girls (age 15-19) was 59.0 per 1,000, up 7 percent from 55.0 in 2006 and well above the national birth rate of 42.5 per 1,000.

**A026: DEVELOP LOCAL MODELS OF ESTABLISHING YOUNG MEN’S MINISTRIES IN INDIGENOUS CONGREGATIONS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention support dioceses and congregations in their efforts to develop ministry among young men in Native American communities; and be it further

*Resolved*, That the Executive Council’s Committee on Indigenous Ministries administer funding for, and gather models of ministry among, young men that encourage active participation in God’s Reign in the Church and in the world; and be it further

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

EXPLANATION

In many of our communities, men have abdicated their responsibility in the home, public forum, and faith communities. This is very prevalent in our Native American communities, where the role of males was undermined by the Europeanization of the Native peoples. Our government intentionally targeted Native males in order to make them subject to the white power structure. Native religious practices were restricted. Traditional means of support were destroyed. Dependency on government handouts, restriction of mobility through the Reservation system, and housing manipulation were implemented. Democracy was introduced as a governing model, ignoring the models of leadership development and selection already successfully in place.

The Church has an opportunity to impact these injustices through granting funds for programs of leadership development and participation in Christian religious practices that return the dignity of every human being, including the Native males who were, and in some cases are still, being stripped of their self-respect. This is evident by high rates of unemployment, substance abuse, domestic violence, and incarceration. If these programs are going to be successful, they must be developed from within the affected communities. It would be our goal to share the learning from the leadership programs with the Church in order to impact other vulnerable populations.

**A027: DEVELOP AND SUPPORT TRIBAL COLLEGE CAMPUS MINISTRY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention support dioceses and congregations in efforts to develop ministry among students and staff in Tribal Colleges; and be it further

*Resolved*, That the Executive Council's Committee on Campus Ministry collaborate with the Provincial Campus Ministry Network and the Episcopal Church Center staff in developing models of ministry that connect the local faith community and the college campuses; and be it further

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

EXPLANATION

Currently there are 32 fully accredited Tribal Colleges and Universities (TCUs) in the United States, with one formal candidate for accreditation. Three are in Associate Status. These TCUs offer 358 programs in total, including apprenticeships, diplomas, certificates, and degrees. These programs include 181 associate degree programs at 23 TCUs, 40 bachelor's degree programs at 11 TCUs, and 5 master's degree programs at 2 TCUs (AIHEC).

Located mainly in the Midwest and Southwest, TCUs service approximately 30,000 full- and part-time students. According to fall 2010 enrollment data, 8.7 percent of American Indian and Alaska Native (AI/AN) college students were attending one of the 32 accredited TCUs. AI/AN students constituted 78 percent of the combined total enrollment of these institutions (2010 Review of Federal Agencies' Support to Tribal Colleges and Universities). The percentages of AI/AN students attending TCUs are increasing yearly. According to a study by the National Center for Education Statistics, the number of American Indian and Alaska Native (AI/AN) students enrolled in TCUs increased by 23 percent between 2001 and 2006.

TCUs are both integral and essential to their communities, creating environments that foster American Indian culture, languages, and traditions. They are often the only postsecondary institutions within some of our nation's poorest rural areas. TCUs serve a variety of people, from young adults to senior citizens, and from American Indians to non-American Indians. They also serve as community resources for crucial social services and add hope to communities that suffer from high rates of poverty and unemployment. And

overall, TCUs have developed programs where students are achieving. The American Indian College Fund reports that 86 percent of TCU students complete their chosen program of study, while fewer than 10 percent of AI/AN students who go directly from reservation high schools to mainstream colleges and universities finish their bachelor's degree.

**A028: SUPPORT INDIGENOUS THEOLOGICAL TRAINING**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention requests the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation for each year of the triennium for support of the Bishops' Native Collaborative, Indigenous training for Province IX, and for other Indigenous ministry training programs under the direction and supervision of the Office of Indigenous Ministry and the Executive Council's Committee on Indigenous Ministries of The Episcopal Church; be it further

*Resolved*, That the General Convention support the ongoing development of the Bishops' Native Collaborative to train and equip leaders and their faith communities in pastoral theology to effectively work with families and individuals; and be it further

*Resolved*, That Indigenous people be encouraged to develop and share these resources; and be it further

*Resolved*, That the General Convention directs the Executive Council's Committee on Indigenous Ministries to seek ways to collaborate with the Dioceses of Oklahoma, Iowa, Montana, Wyoming, Minnesota, Hawaii, Fond du Lac, Olympia, Los Angeles, Western North Carolina, Ecuador Central, Central Gulf Coast, Western New York, Central New York, Long Island, Northern California, Rio Grande, Arizona, Nevada, Utah, and others with Native members for purposes of theological education.

**EXPLANATION**

The Bishops' Native Collaborative is a consortium of the Niobrara School for Ministry, Hooghan Learning Circle, North Dakota School for Ministry, David Salmon School for Ministry, Father Paul Mather School for Ministry of the Dioceses of Alaska, North Dakota, South Dakota, Montana, and the Navajoland Area Mission. Its goal is to provide training for lay and ordained leaders by sharing resources for theological education based on, but not limited to, the seven subject areas listed in Canon III.5(g) of The Episcopal Church. Training for the indigenous peoples of Province IX responds to the recent and increasing expansion of 10,000 Episcopalians, most notably among the Kichwa people of the Diocese of Central Ecuador.

**A029: PROTECT HUMAN TRAFFICKING VICTIMS ON INDIAN RESERVATIONS IN MONTANA AND NORTH DAKOTA**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention calls for the protection of all victims of human trafficking, particularly women and children, by providing necessary attention to their physical, psychological, and social needs using approaches that respect victims' rights and integrity; and be it further

*Resolved*, That the 78th General Convention urges members of The Episcopal Church to support governmental hearings, legislation, and action to promote the recovery and reintegration into society of victims of human trafficking; providing a safe, dignified, and sustainable way for trafficking victims to reintegrate into society and lead a normalized life; and be it further

*Resolved*, That the 78th General Convention affirm the continued participation of The Episcopal Church in the Indigenous groups of the United Nations dealing with human-trafficking issues, particularly, though not exclusively, the United Nations Commission on the Status of Women and the United Nations Permanent Forum on Indigenous Issues, for the purposes of education, advocacy, and collaborative partnerships; and be it further

*Resolved*, That the Episcopal Church conduct an educational campaign to make the public aware of the impact of human trafficking on Indigenous people, particularly, but not exclusively, in Montana and North Dakota; and be it further

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

EXPLANATION

U.S. Senate Hearing entitled, “Combating Human Trafficking: Federal, State, and Local Perspectives” before the Committee on Homeland Security and Governmental Affairs, Monday, September 23, 2013:

“Congressional findings are that Native American and Alaska Native women are raped 34.1 percent, more than 1 in 3, in their lifetime; 64 percent, more than 6 in 10, will be physically assaulted. Native women are stalked more than twice the rate of other women. Native women are murdered at more than ten times the national average. Non-Indians commit 88 percent of violent crimes against Native women.

With the recent wide-range impact of extractive industries such as oil fracking and pipelines is predatory economics at its worse for the Fort Berthold Nation in North Dakota and Fort Peck Reservation in Montana. With the fracking of the Bakken formation ... [there] has been a doubling and tripling of numbers of sexual assaults, domestic violence and human trafficking incidents since 2008.

Within Northeastern Montana ... Groups of men from the man camps use free access to drugs and alcohol as a method of coercion for young native women to ‘get in the car’ and go party. This has resulted in 11 young Native women ranging from the ages of 16-21 years of age reporting rape, gang rape and other sex acts; the majority of these victims are afraid to report due to fear and shame.”

**Budget**

ECCIM hopes to meet face-to-face three times during the next triennium. This will require \$18,200 for 2016; \$18,200 for 2017; and \$18,200 for 2018, for a total of \$54,600 for the triennium.

# EXECUTIVE COUNCIL COMMITTEE ON SCIENCE, TECHNOLOGY AND FAITH

## Membership

The Rev. Alistair So, *Chair*, 2015  
Mr. H. Talmage Day, 2015  
Mr. Shawn Evelyn, 2015  
Dr. Lisa Fortuna, 2015  
The Rev. Stephanie Johnson, 2015  
The Rt. Rev. W. Nicholas Knisely, 2015  
The Rev. Evelyn Manzella, 2015  
Ms. Meredith Rawls, 2015  
The Rt. Rev. Mark Sisk, 2015  
Dr. Edward B. Sisson, 2015  
The Rev. Dr. R. Jim Trainor, 2015  
Mr. Joseph Wolyniak, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Katie Sherrod, *Executive Council Liaison*  
Mr. Richard Serota, *Staff*

## Summary of Work

**Mandate:** To identify, explore, and recommend policies to General Convention and Executive Council regarding emerging issues in science and technology and their implications for Christian faith, life, and practice. Duties:

- To represent the Church in ecumenical and other gatherings relating to its concerns;
- To facilitate education on the theological, scientific, and ethical implications of policy-related and other controversial issues;
- To serve as a resource for the House of Bishops and other Church bodies.

### **Resolution A013: Study Genetically Modified Food Crops**

The Executive Council referred Resolution A013, Study Genetically Modified Food Crops, adopted by the 77th General Convention to the Committee on Science, Technology & Faith. The Resolution calls upon the Church to empower the 78th General Convention to take action toward developing policy to address issues arising from the development of genetically engineered plants and patenting of genetically modified organisms (“GMOs”). The specific concerns identified in the resolution included the consequences for biodiversity, agricultural sustainability, the environment, human nutrition, health and disease, and economic impacts on small farmers. The Resolution further commended the leadership of the Evangelical Lutheran Church in America (ELCA) for its work on the moral, ethical, and theological principles raised by GMOs.

Drawing upon principles for a just society developed and employed by the ELCA in a number of its social statements, other recent work in Christian ethics, the science policy literature, and other scientific literature significant for establishing policy context, Tal Day, Chair of the Subcommittee on GMOs of the Executive Council Committee on Science, Technology & Faith prepared a working paper framing and reviewing the issues raised by the Resolution. The working paper identified subject matter and general principles that could be incorporated into appropriately framed resolutions for submission to the 78th General Convention.

As support for the Resolution's call that Episcopalians study about GMOs and reflect upon their duty of stewardship of creation and the related issues of economic development, food insecurity, biodiversity, and environmental sustainability, the Committee has published, in addition to the working paper, an annotated bibliography of selected resources. Links to each of these work products are on the website maintained by the Committee at <http://episcopalscience.org/gmos/>.

A short article by Tal Day summarizing the GMO issues considered and the particular perspective on GMO issues afforded by the Christian tradition, "GMOs and Protection of 'Nature,'" is being published in the September 2014 issue of *Covalance*, the Bulletin of the ELCA Alliance for Faith, Science and Technology. A resolution framing policy proposals supported by the working paper and narrative supporting the resolution is including in this report.

### **Ecumenical Roundtable on Science, Technology, and the Church**

The Episcopal Church's Executive Council Committee on Science, Technology, and Faith (ECCSTF) recently hosted members of several denominations for the annual Ecumenical Roundtable on Science, Technology, and the Church (ERT, May 7-10, 2014). Lutherans, Presbyterians, Congregationalists, and other ERT attendees joined Episcopal delegates to explore a variety of issues pertaining to science, technology, medicine, and the Christian faith — from the recent discovery of primordial gravitational waves to the latest climate-change projections. Begun years ago as an informal gathering, ERT has grown into an annual gathering of Christians seeking to ecumenically engage in discussion of a range of theological, philosophical, and ethical topics.

Attendees began their meeting with Committee work in their respective denominational groups, and then joined together for prayer, worship, conversation, and fellowship. The Rt. Rev. Scott Hayashi (11th Bishop of Utah), who hosted the gathering at the Episcopal Church Center of Utah and celebrated at the ecumenical Eucharist, surmised: "Gathering people from different denominations and expressions of the Christian faith is in itself an enriching experience. To be together for the purpose of learning from one another and advancing the conversation on the intersection of faith and science is a demonstration that reason and faith are not strangers to each other, just as people who seek the truth are not strangers to one another."

The Rt. Rev. W. Nicholas Knisely (13th Bishop of Rhode Island and ECCSTF bishop-member) likewise touched on themes of pursuing mystery in science and faith in his homily at the ERT Eucharist: "A rabbi once told me, in a conversation about faith and science, that God hides the truth from us and expects us to use all our faculties to find it. That is counter to the common understanding of how science or theology work, but for those of us who are seekers in both fields it is something that we know to be true. We encounter it every day of our lives."

The culminating event was a keynote address entitled, "Christology, Evolution & the Theological Imagination" by The Rev. Dr. W. Mark Richardson (President & Dean, Church Divinity School of the Pacific). The address focused on Anglican responses to Darwinian evolution in the late nineteenth and early twentieth centuries, including by figures such as Charles Gore (1853-1932) and William Temple (1881-1944). The conference was live-tweeted with #ERT2014, and the keynote was live-streamed via a Google+ Hangout On Air, with an opportunity for members of the public to submit questions on the Hangout or via Twitter (@episcosci) or Facebook (fb.com/episcopalscience). The live-streamed event is archived and available for viewing on the ECCSTF's YouTube page.

Following the keynote address, Meredith Rawls (lay ECCSTF member from the Diocese of the Rio Grande and PhD candidate in astronomy at New Mexico State University) hosted stargazing for ERT attendees and members of the public, with help from a colleague in the Department of Physics & Astronomy at the University of Utah. ERT attendees glimpsed Jupiter, Saturn, Mars, and the Moon through a telescope. "Our star party — part of the worldwide #OneSky event — was the perfect way to close the day," noted Rawls.

The chair of the ECCSTF, The Rev. Alistair So (Rector, All Hallows Parish, Diocese of Maryland), summed up the gathering as “a model of ecumenical engagement not just for the purpose of the important dialogue between science and faith, but also as an example of how our various denominations can work together in the mission field of the 21st century.” In his presentation to the group, The Rev. Dr. Roger Willer (Canon Theologian to the Presiding Bishop in the ELCA) echoed these sentiments: “The Ecumenical Roundtable is one of the more important ecumenical efforts I am aware of, addressing such pressing issues [related to science and technology] in the Church and wider society.”

At the gathering, the ECCSTF worked on resolutions assigned at the 77th General Convention — tackling issues from Genetically Modified Organisms (GMOs) to weaponized drones — in preparation for the upcoming 78th General Convention. The Committee is also working to revamp and more widely distribute the “Catechism of Creation” (originally developed and disseminated by the ECCSTF in the previous triennium) in keeping with a resolution passed at the 77th General Convention that “affirmed the compatibility of science and the Christian faith” and “encourages the dioceses and parishes of The Episcopal Church to establish Christian education programs pertinent to this complementary relationship.”

More information can be found on the website of the Episcopal Network for Science, Technology & Faith (ENSTF, <http://episcopalscience.org>). You can also like the ENSTF on Facebook (<fb.com/episcopalscience>) or follow the Network on Twitter (<twitter.com/episcosci> or [@episcosci](https://www.instagram.com/episcosci)).

#### **W. Mark Richardson Granted 2014 Genesis Award**

The Very Rev. Dr. W. Mark Richardson (President and Dean, Church Divinity School of the Pacific) was awarded the 2014 Genesis Award from the ENSTF following his keynote address at the recent Ecumenical Roundtable on Science, Technology & the Church that was hosted by The Episcopal Church’s Executive Council Committee on Science, Technology & Faith (ECCSTF).

The Genesis Award recognizes Episcopalian leaders in the ongoing science and religion dialogue. Richardson was granted the award for his decades of scholarship, teaching, and leadership on issues related to science, technology, and faith. A priest, scholar, lecturer, theologian, and Episcopal Church Foundation Fellow (1990), Richardson has written extensively on faith, science, and evolution. He was the founder and director of the Science and Spiritual Quest Project at the Center for Theology and the Natural Sciences (Berkeley, CA), an effort which led to the publication of *Science and the Spiritual Quest: New Essays by Leading Scientists* (Routledge, 2002). He has authored, edited, and co-edited several other essays and books, including *Faith in Science: Scientists Search for Truth* (Routledge, 2001), *Human and Divine Agency: Anglican, Catholic, and Lutheran Perspectives* (University Press of America, 1999), and *Religion and Science: History, Method, Dialogue* (Routledge, 1996).

Richardson received his PhD from the Graduate Theological Union (GTU) in 1991, writing a thesis on the 1956/57 Gifford Lectures of the English theologian, philosopher, and priest Austin Farrer (one of the leading figures of 20th-century Anglicanism). Serving as an Associate Professor-in-Residence of Philosophical Theology at the GTU until 1998, Richardson joined the faculty at General Theological Seminary (New York, NY) in 1999, where he served as a Professor of Theology until his appointment as President and Dean of CDSP. Richardson also served as a Senior Theological Advisor to the Trinity Institute (a continuing education program of Trinity Wall Street, New York, NY) and as Chair of the Editorial Committee for the *Anglican Theological Review*.

The ENSTF gave the first Genesis Award in 2005 to The Rev. Dr. J. John Keggi, a retired priest of the Diocese of Maine who holds a PhD in organic chemistry, who served as a longtime co-convenor of the North American chapter of the Society of Ordained Scientists, and who was instrumental in the formation of the ENSTF.

Other recipients of the award include the late Rev. Dr. Peter Arvedson in 2006 (who passed away in 2011, having served in six different parishes over 35 years after obtaining a PhD in inorganic chemistry from the University of Wisconsin and a master of divinity from General Theological Seminary); The Rev. Barbara Smith-Moran in 2007 (a priest in the Diocese of Massachusetts with a background in chemistry and astronomy, founder of the Faith & Science Exchange in Boston, and one of the co-founders and first co-chairs and of the ECCSTF); and Dr. Robert J. Schneider in 2008 (professor emeritus of Berea College, lead author of the Catechism of Creation, and co-chair of the ECCSTF from 2003-2006). Richardson is the first recipient of the Genesis Award since 2008.

### **Miscellaneous**

1. We are currently working on a resolution to address the Church's role in responding to the effects of global climate change.
2. We are in the process of updating the Catechism of Creation. In particular, we hope to produce materials for use in the Christian Formation of all ages.

### **PROPOSED RESOLUTION**

A030: CREATE TASK FORCE ON CLIMATE CHANGE

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of the Episcopal Church call upon the Executive Council to create a task force to begin to create resources for parish and diocesan use that will equip faithful Christians to respond pastorally and materially in their local context.

The Task Force is asked to report back to the 79th General Convention on its progress and to share what is already happening at the local and diocesan levels in The Episcopal Church.

### **EXPLANATION**

The question of whether or not climate change is occurring is no longer open. Scientists, by broad agreement, see that an increase in the Earth's atmospheric temperature is driving changes in sea level, storm intensity, and large-scale and local climate instability. The Church has a responsibility to respond on a number of levels to these changes. Church buildings may be lost or relocated. Existing industries may be imperiled, and new industrial challenges will emerge, creating significant economic difficulties for governments and citizens worldwide. There will be significant impact on wildlife. Agriculture will have to adjust to the changing weather and, as it is doing that, food insecurity in this nation and others may expand beyond present levels. All of these factors together will require a coordinated response for which, at present, little planning has occurred.

## **Budget**

The Executive Council Committee on Science, Technology, and Faith plans to meet approximately four to five times during the next triennium. This will require \$10,000 for 2016, \$10,000 for 2017, and \$10,000 for 2018, for a total of \$30,000 for the triennium.



# EXECUTIVE COUNCIL COMMITTEE ON THE STATUS OF WOMEN

## Membership

The Rev. Dr. Paula D. Nesbitt, *Chair*, 2015  
The Rev. Canon K. Jeanne Person, *Vice Chair*, 2015  
Ms. Molly Childs  
The Rt. Rev. Susan Goff, 2015  
The Rt. Rev. Mary Gray-Reeves, 2015  
Ms. Caressa M. James  
Ms. Barbara Mann, 2015  
The Rev. Yejide Peters, 2015  
The Rev. Dr. Shane Phelan, 2015  
The Rev. Deacon Ema Rosero-Nordalm, 2015  
Ms. Jamel Shimpfky, 2015  
Ms. Enedina Vásquez  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*, 2015  
The Rev. Gay Clark Jennings, *Ex Officio*, 2015  
The Rev. Dahn Gandell, *Executive Council Liaison*  
Ms. Lynnaia Main, *Staff*

### *Changes in Membership*

Appointed: Mr. Alan Murray, 2015

Withdrew: Ms. Molly Childs, Ms. Caressa M. James, Ms. Enedina Vásquez

Change in Canonical Residence: The Rev. Canon K. Jeanne Person, Vice Chair

### *Representation at General Convention*

Deputy Alan Murray and Bishop Mary Gray-Reeves are authorized to receive non-substantive amendments to this report during Convention.

## Summary of Work

**Mandate:** To support and advise the Presiding Bishop on matters affecting the participation of women in the Church; to advise other Church leaders and bodies engaged in supporting women's ministries; to advocate for women's ministries and for justice issues that particularly affect women; and to monitor and analyze patterns of women's participation in the Church.

Established as a committee of the Executive Council by General Convention in 1988, the Committee on the Status of Women serves the important role of being an official body of The Episcopal Church advocating for women.

**Meetings:** In this triennium, the Committee accomplished its work mostly through web conferences, email messages, and other digital communication. Committee members gathered for one face-to-face meeting held September 3-6, 2013 at the Maritime Institute of Technology in Linthicum Heights, Maryland. Web conferences were held in 2013 on March 6, May 10, July 2, July 31 (executive session), October 9, and October 18; and in 2014 on January 15, March 12, April 23, May 29, July 2, and August 27. Additionally, subcommittees working on Resolutions A143 and D042 of the 77th General Convention, and a subcommittee working on Latina Ministries, also met by web conference.

**Introduction**

The Committee on the Status of Women takes seriously its mandate to advocate for both women's ministries and those justice issues that significantly affect women. We celebrate where progress toward gender equality and justice is being made, yet also believe our work still matters. Within the Church, women continue to confront inequalities in job attainment, compensation, and other measures of participation. Within the global community, women and girls still disparately face exploitation and victimization through human trafficking and other forms of violence, loss of human rights, feminization of poverty, and unequal access to health care. Our Committee's advocacy and monitoring roles serve as a crucial resource in the Church's mission to transform unjust structures and challenge violence.

By addressing women's gifts and challenges, our work also informs the Church's efforts to transform itself for sustainable mission in the twenty-first century. Given tight fiscal resources and the need for the Church to reconsider traditional ways in which its mission has been accomplished, we appreciate the confidence given to us as the institutional voice for examining the status and contributions of women. We especially value the appointment of members, both lay and ordained, who are diverse in race, ethnicity, age, gender, and geography. Our diversity has enriched our work.

During this triennium, we sought to model collaboration, working with other CCABs and staff, and we were especially successful in efforts on two resolutions referred to us by the 77th General Convention: Fighting Human Trafficking (D042) and Develop a Search Toolkit (A143). We express our gratitude to all who joined us in this work.

**Action on 2013-2015 Mandates**

For the 2013-15 triennium, the 77th General Convention assigned to our Committee work on three resolutions:

*Fighting Human Trafficking (D042)*

The numbers are staggering: Each year, an estimated 17,500 men, women, and children are trafficked into the United States; and an additional 100,000 children who are U.S. citizens are trafficked within the nation's borders. These victims of human trafficking are compelled against their will, through force, fraud or coercion, to perform labor or commercial sex acts. The majority are girls exploited for forced prostitution. They are trafficked by organized criminals through residential brothels, online escort services, strip clubs, and massage parlors. They join the more than 20 million women, men, and children worldwide who are victims of human trafficking, sold for an average price of \$90 each.

In response to this modern-day slavery, the 77th General Convention recommitted the Church in the fight against human trafficking through education, advocacy, and action both to protect victims and assist with their recovery and reintegration into society. This commitment is in keeping with the Church's mission to respond to human need by loving service and to seek to transform unjust structures of society, to challenge violence, and to pursue reconciliation. Furthermore, General Convention specifically requested that our Committee work with the dioceses and provinces of the Church in the sharing of vital resources on human trafficking and in helping Church leaders to recognize how both domestic and international trafficking affects people in their local mission contexts. For this work, we formed a subcommittee on human trafficking.

In the United States, human trafficking is often associated with large sporting events. The Super Bowl of the National Football League, for example, is believed to spur significant increases in trafficking. During the 2012 Super Bowl festivities, an estimated 10,000 women and girls were trafficked. Today, in preparation for the Super Bowl, law enforcement, attorneys general, the interfaith community, and community advocates work together to deter trafficking and to raise awareness. Our Committee has joined in these efforts, especially with the purpose of educating the Church and galvanizing its response.

In conjunction with the National Human Trafficking Awareness Day in January 2014, with the support of the Episcopal Church Center, we organized a church-wide conference call on January 17, 2014 that brought together Episcopalians and interfaith and ecumenical partners involved in countering trafficking. Our aim was to raise awareness about the interrelationship between the Super Bowl and trafficking, to brainstorm ideas for effective response, and to network with others. This conference call drew about 35 participants from across the provinces. Participants came away with new knowledge about combating trafficking and deepened commitment to the effort.

In February 2014, the Executive Council established a D042 Coordinating Committee to assist further in the work of raising awareness, networking, and sharing resources. Our Committee appointed one of our members to this D042 Coordinating Committee to assist in the effort to combat trafficking. We believe that this work needs to continue in the next triennium. Until the reality of human trafficking is ended, the Church needs to do all in its power to fight this horrific exploitation and to emancipate all who have been robbed, plundered, and trapped and yet whom God has called by name.

#### *Develop a Search Toolkit (A143)*

In 2012, the 77th General Convention sought to address gender inequality in ordained leadership within the Church, at both the parish and diocesan levels, by mandating the development of a search toolkit for use by Church leadership discernment committees and female clergy applicants. Our Committee had sponsored the resolution for a search toolkit and gladly received the mandate to work collaboratively on its development with other Church bodies. For this work, we formed a subcommittee whose members joined with representatives of the Office of Transition Ministries, the Office of Communications, staff, and other bodies to envision the toolkit, gather resources for it, and begin its implementation and dissemination.

This search toolkit will serve as a resource for search committees at all levels of Church organization and for female clergy in many different discernment processes. Content will include educational resources about the personal choices and cultural stigmas that can influence discernment processes; personal stories of the experiences of female clergy in searches; data on the continuing gender gap in job attainment and compensation; information about mentoring opportunities, conferences for women's leadership, and other supportive resources; and advice for both female candidates and search committees. The toolkit, we believe, will help to transform unjust structures and unrecognized biases within the Church that prevent the full flourishing of ordained women's leadership; and will be an effective resource for enhancing the Church's use of women's, as well as men's, gifts and skills for ministry.

We have made great strides in the development of the search toolkit, despite obstacles. Before the resolution was assigned for action, \$5,000 in funding that had been approved by General Convention was stripped away, resulting in a mandate that would prove difficult to achieve given the vast amount of information to be gathered. Even so, we sought to leverage planning and development work through a joint task force. A second challenge was a sudden departure of the Program Officer for Transition Ministry, who had been working with the joint task force to host the toolkit online through the Office of Transition Ministry. This meant that other possibilities for dissemination had to be pursued. In July 2014, we reached an agreement with the Office of Communications to host the toolkit on The Episcopal Church's website, including a link to the Office of Transition Ministry.

The public launch of the first phase of search toolkit is now timed to coincide with the 2015 United Nations Commission on the Status of Women gathering in March 2015. We are developing the toolkit in phases, in part due to the loss of funding and due to the lengthened implementation process. Additionally, we have decided to address as wide an audience as possible. We aim to support female clergy who are in vocational discernment, entering parish and diocesan staff searches, entering a search for bishop, or who are interested in leadership development. We also seek to create resources specifically for younger or older clergy and female clergy of color. Furthermore, we seek to create a helpful resource for bishops and transition

ministers, parish search committees, those involved in diocesan staff searches, and search and transition teams for episcopal elections.

The search toolkit's key resources will need ongoing development, and its effectiveness will require networks of contributors so that, over time, it will be both self-sustaining and responsive to the changing needs of both female clergy and those involved with clergy transitions. For these reasons, we believe work on the toolkit should continue to be a priority in the 2016-18 triennium.

#### *Strengthen Small Congregations (A076)*

A growing number of congregations in The Episcopal Church are small ones needing the Church's encouragement and support in their mission. In response, the 77th General Convention asked each body and program of the Church to take into account the impact of its activities on small congregations and dioceses. We met this request by forming a subcommittee to focus on the needs and concerns of women clergy and lay pastoral leaders who serve in small congregations.

Our particular concern was the cluster of financial and resource challenges these women face. The primary work of the subcommittee was to contribute to the development of a search toolkit with resources related to women in small congregations. We also desired to participate in broader work across the Church to support women in small congregations, but in this triennium, our efforts at consultation and collaboration in this area were not successful.

#### **Women's Leadership**

As her nine-year tenure draws to a close, we express our profound gratitude for our Presiding Bishop, The Most Rev. Dr. Katharine Jefferts Schori. During her ministry as the first female Presiding Bishop of The Episcopal Church and the first female Primate of the Anglican Communion, she has greatly enhanced the status of women. We recognize the fractious ethos of the Church as she began, and also the fragile state of the Anglican Communion, and we applaud her wise and courageous leadership in circumstances that at times were less than gracious. With humility and collegiality, she has led the Church and Communion to higher ground. Her leadership is an inspiration to women and men.

We are grateful, too, for the leadership of The Rev. Gay Clark Jennings, President of the House of Deputies, in this triennium, and for her wisdom and responsiveness to the needs of the Church.

#### *Commemorations*

During this triennium, our Committee issued three commemorative statements on the anniversaries of important milestones in the advancement of women. In 2014, the Church celebrated the 70th anniversary of the ordination of the Rev. Dr. Florence Li Tim Oi as the first female priest in the Anglican Communion; the 25th Anniversary of the consecration of the Rt. Rev. Barbara Clementine Harris as the first female bishop in the Anglican Communion; and the 40th Anniversary of the ordinations of the first female priests in The Episcopal Church, commonly known as the Philadelphia 11. These women suffered hardships and hatred as they pursued their vocations, as did the men who courageously encouraged their ministries and broke precedent in ordaining them. Links to our statements may be found on the "Women in the Church" page of The Episcopal Church's website.

#### *United Thank Offering*

In the fall of 2013, our Committee found itself in a unique position to listen to a range of concerns being raised by the Board of the United Thank Offering, in its relationship with the Domestic and Foreign Missionary Society, over a new set of bylaws. As the only official Church body mandated to address issues of justice for women, we advised the Executive Council in this matter and helped to broker a mutually beneficial resolution. We are grateful for the diversity of perspectives shared in the collaborative process and

for the Executive Council's positive action in affirming the ministry of the United Thank Offering and achieving reconciliation.

#### *Women's Ministries Networks*

We are committed to the development of networks that offer resources and support for women's ministries, and we believe that such networks will enhance the Church's mission both to respond to human need by loving service and to transform unjust structures.

In the Committee's budget-visioning process for the upcoming triennium, however, it became clear to us that such networks will need coordination by a Church staff member for their flourishing, accountability, and continuity. The ideal of self-sustaining women's ministries networks cannot be realized, we believe, without knowledgeable staff dedicated to the work of making possible lively and meaningful networking across all aspects of women's ministries. Such a dedicated resource will also ensure that all dioceses participate in women's ministries networks and respond to demands beyond the scope of volunteers.

#### *Supporting Latina Ministries*

This triennium, the Committee's membership included both lay and ordained Latinas. Their experiences in ministries with Latina populations presented an invitation for us to pursue our work in the distinct context of the needs of Latinas, as women and as a minority within a Euro-American majority.

We identified key needs of both lay Latinas and those feeling called to Holy Orders. Lay Latinas, for example, easily can become segregated into hospitality functions and not be given opportunity or empowerment to try other ministries. Equipping them for wider ministries, through leadership skills development, will not only benefit their faith communities, but also lead to better employment opportunities for them. Meanwhile, Latinas who discern a call to ordination can face many pressures. Parish clergy may be hesitant to lose skilled lay support. The women can face attitudinal barriers stemming from former Roman Catholic understandings, especially the exclusion of women from ordained ministries. Their faith communities may feel ambiguity over culturally imbued concepts such as "discernment." Finally, all Latinas may face the challenges of implicit cultural norms and gender roles, as well as multicultural insensitivity. The Church, we believe, must strive to ease these barriers and raise up Latinas as leaders.

Doing so will not be easy. For one, the varied cultures and generations of Spanish-speaking people in the Church and within the nation present complexities. Historically, some have used these internal differences in secular settings as a means of abdicating responsibility to extend needed support, a tactic that maintains hegemony. For another, we anticipate concerns over why Latinas specifically should be empowered, and why Latin Americans should be singled out over other deserving constituencies. Such cautions, although well-meaning, serve to erode the possibility of substantive action. This is heartbreaking and violates the Church's commitment to enhance mission by seeking to change unjust structures.

Consequently, we are committed to supporting Latinas. We hope that our proposals for Latina ministry and leadership development can serve as a model for extending advocacy and support for all marginalized groups.

#### *Women's Indaba*

In March 2013, the first Indaba event designed specifically for women took place at the Episcopal Church Center in New York. Facilitated through a partnership between the Anglican Communion's Continuing Indaba program and Anglican Women's Empowerment, the Indaba event was also the first to address a specific theme — the elimination and prevention of all forms of violence against women and girls — and the first pursued as a three-day program. The women who participated came from the global north and south and from different cultures and experiences. As the women listened to one another and learned of their

varying perspective, their experience was rich. The women discovered a desire to go even deeper toward creating pathways for healing and wellness for women and girls.

Our Committee gives thanks for the first Women's Indaba, and we ask the Church to continue supporting Women's Indaba programs during the upcoming triennium. Women's Indaba, we believe, will facilitate progress in the advancement of women and the redress of the feminization of poverty, gender inequality in education and health care, and violence against women and girls. Women's Indaba also will serve as a model for interactions among women in partnered dioceses across the Anglican Communion.

### **Violence Against Women and Girls**

Our Committee has a strong commitment to fighting violence against women and girls and striving for both strategic and sustainable solutions. As such, we commend the Church's active role in combating such violence, notably human trafficking both within our local communities and globally. Yet more needs to be done. We urge the Church to actively address many other forms of gender violence, including domestic violence, violence related to drug and alcohol addictions, and sexual assault. A priority of the Church in the upcoming triennium must be to raise awareness and education on the many forms of gender violence.

Sexual assault, we note, dramatically affects women and girls regardless of their race, ethnicity, or economic background. Sexual assault is both local and global, occurring in virtually every community worldwide. One particular form of sexual assault about which our society is becoming more aware is date rape, which especially harms young women and teenage girls. Most college campuses and high schools have not yet taken serious steps toward the prevention of date rape. We see an opportunity for collaboration across the Church, and especially with youth and young adult ministry leaders and campus ministry leaders, in creating resources for educating communities about date rape and fighting against it.

### **Addressing Gender Inequalities**

Despite how far both the Church and society have come, many structural barriers to gender equality persist, creating significant disadvantages for women and girls. During this triennium, we have especially focused on the following issues:

#### *Discrimination in Health-Care Access*

Access to health care is important for women's maternal health, which has a direct effect on the health and wellbeing of the next generation of children, and for women's reproductive health, including the ability to control fertility during those times when pregnancy is inadvisable. Our Committee has been greatly concerned, therefore, over the 2014 ruling by the United States Supreme Court that will allow the corporation Hobby Lobby Stores, Inc. to deny employees insurance coverage for contraception. This decision, which sets a precedent for other closely held corporations, will block women's access to birth control and, consequently, their full and equal access to health care. In other words, the ruling creates a gender inequality in the health-care system: For women of childbearing age, access to health care affecting their reproductive system cannot be considered optional, any more than core aspects of health care for men should be excludable from insurance coverage.

Contraception is a safe and effective way for women to avoid the stresses and potentially serious health implications of unwanted pregnancy. Those who would deny access to contraception, we fear, also may be unlikely to support comprehensive support or benefits for terminating a pregnancy, or to offer paid family leave for parenting, or to provide extended health care should health complications arise, putting women in a position of double jeopardy.

As people of faith, we also view the Hobby Lobby ruling as a misappropriation of the First Amendment right to religious freedom. Our nation affirms that employers can never discriminate against workers on the basis of gender, race, sexual orientation, or other characteristics, regardless of the religious belief of owners or

management. A similar approach must be taken in matters of health care. Any corporation that employs members of the wider public must make provisions, we believe, to ensure access to full health care for its employees. Already, federal accommodations have been made for faith-affiliated nonprofit institutions to allow women access to contraception through third-party means without direct expense to those organizations. The same can be true for closely held corporations. Just as Jesus crossed the boundaries of his faith tradition's law and custom to reach out and offer healing to women in need, so too should the Church affirm and advocate for the use of third-party solutions for granting women full access to health care, including birth control.

#### *Women's Well-Being in the Economy*

The economic recovery of this triennium has brought uneven job growth to different geographic and population sectors. Those sectors where well-paying jobs are increasing, such as high-tech, are often ones with low percentages of women workers and inequitable compensation by gender. By comparison, women are disproportionately likely to work in low-wage jobs, such as in factories, fast-food restaurants, retail stores, and care-giving settings. Meanwhile, the employment and compensation disparities faced by women of color remain especially significant.

The economic struggles of women and children who live in or near poverty continue to concern our Committee, especially in view of the recent public policy debates over raising the minimum wage. A full-time, minimum-wage worker, woman or man, in most cities cannot afford housing, food, and child care. Often minimum-wage jobs carry no benefits, and low-wage workers are manipulated to remain part-time so as to disallow access to benefits. Meanwhile, according to The Bureau of Labor Statistics, about two-thirds of minimum wage earners are female. All of this amounts to exploitation of women. Although recent minimum wage increases in some states and cities are heartening, we urge the Church to continue strongly advocating for legislative change, locally and nationally, to support low-wage workers and to raise awareness that the minimum wage debate is a gender issue.

In all, we remain committed to addressing persistent gender disparities in compensation that cut across all occupations and organizations. No woman should ever be offered or paid less than what would be offered or paid to a man for the same work. And all people, women and men, lay and ordained, have the inherent right to a living wage.

#### *Female Clergy*

We rejoice that, since the first ordinations of the Philadelphia 11 forty years ago, we have seen growth of women's ordained ministry throughout the Church. Indeed, it is truly remarkable that women now hold the highest two offices in the Church. Structural barriers for women have been removed in every diocese and office, and women's ordained leadership has transformed how all people understand and perform their ministries.

We are mindful, however, that gender gaps persist in senior-level attainment and in compensation. According to Church Pension Fund and *Called to Serve* data, this gap has little changed over the last twenty years. The data also suggest that the Church needs specifically to address subtle misconceptions and biases that work against women, in order to ensure equitable discernment and search processes. Although Church canons and policies support gender equality, behavior has not matched their intent.

Of particular concern for us is the pattern of elections for diocesan bishops. The percentage of women in the House of Bishops remains staggeringly low. Since the election of the Rt. Rev. Mariann Edgar Budde in June 2011, no woman has been elected to serve as a diocesan or co-adjutor bishop, despite female finalists in numerous elections. As of September 2014, only three women were serving as diocesan bishops, a pattern that differs little from a generation ago. Given the growth in the number of female clergy over the same period, many of whom have gained extensive leadership experience and expertise, we believe the Church

needs to be concerned, even while affirming the leadership gifts and skills of the men elected. Research must be called for to identify subtle policies and practices that may be disparately affecting women in the episcopal election processes.

Future work in this area will require strong commitment at all levels of Church leadership and voluntary behavioral change, both of which remain largely elusive. Will bodies across the Church become more willing to assist the Office of Pastoral Development in its mandate from the 77th General Convention (A144) to monitor the status of women in episcopal elections, recommend steps to improve the ratio of women elected, and recommend steps needed to eliminate biases that can perpetuate discrimination? Will the Church Pension Fund continue to make available annual Compensation Reports and other data with gender comparisons? If the Church truly holds the mission intent of changing unjust structures, commitments to transparency and to analyzing problematic patterns need to be part of equitable solutions.

#### *Restructuring, Gender Mainstreaming, and Gender Budgeting*

Used successfully by the United Nations and other organizations for many years, gender mainstreaming is the effort to assess the different implications for women and men of any planned action, including legislation, policies, and programs, in order to ensure gender equity. During this time of envisioning a restructuring of the Church for mission in the twenty-first century, we urge that gender mainstreaming inform all conversations, decisions, and restructuring steps at all levels of the Church to prevent unintended gender inequalities that might otherwise emerge. Strict scrutiny of all proposed measures will help to ensure that any new Church structure is just.

Gender budgeting involves the analysis and development of budgets for the purpose of allocating money in ways that are fair to women and men. Gender-responsive budgets, furthermore, are those that allocate funds toward policies and programs that will change patterns of gender inequality. Especially because Church restructuring will involve major changes to the Church's budget, we also recommend gender budgeting as a means to ensure that measures to address women's marginality, vulnerability, and inequality are not overlooked.

Both gender mainstreaming and gender budgeting will lead to decisions that are made thoughtfully and in full consideration of possible outcomes. It is crucial, we believe, that no proposed restructuring steps, or residual effects of restructuring, work against women or other underrepresented groups in Church leadership or any ministry. This is especially imperative, we believe, in light of the Church's mission to seek to transform unjust structures.

#### **Conclusion**

Our work during this triennium has revealed that many challenges for women and girls in the Church and in society still need to be addressed. We rejoice in the Good News of Christ, which energizes us for this work on behalf of the Church. Our love for the Gospel and the Church, and the setting of our hope in Christ, encourage us to continue. We are also heartened by the growing racial and cultural diversity within the Church, by a rise in young adult leadership, and by the Church's commitment to changing unjust structures and practices. All are healthy manifestations of the Church's emerging mission in the twenty-first century. We are very optimistic about the Church's future.

#### **Objectives for the 2015-2018 Triennium**

For its work in the 2016-18 triennium, the Committee offers the following objectives:

*Continue with the development, promotion, and distribution of the search toolkit.*

Although foundational strides have been made in the development of a search toolkit, especially through collaboration across sectors of the Church, significantly more resources are needed both for ordained women and for parish and diocesan bodies engaging in search and hiring processes. Ultimately, we seek to



put into place a self-sustaining network of transition ministers and female clergy to review and create new resources and tools as fresh needs arise.

*Fight against human trafficking and other forms of violence against women and girls.*

Established by Executive Council in 2014, the D042 Coordinating Committee will continue its work on addressing human trafficking, and we will join in this work through our representation on this Committee. Additionally, we will expand our focus to include other forms of violence against women and girls, helping the Church to become more aware of the violence occurring in every local context, to work for its prevention, and to create environments of trust.

*Advocate and advise in the development of women's ministries networks.*

Women's ministries networks are critical for empowering women for the Church's mission. We will work for the creation and flourishing of women's ministries networks and support a staff coordinator who can help foster such networks throughout the Church; offer oversight for their flourishing, accountability, and sustainability; and encourage volunteer commitment.

*Advocate for Latinas and women from other underrepresented or marginalized groups.*

Spanish-speaking members represent a growth area of the Church. Therefore, leadership development among both lay Latinas and those feeling called to Holy Orders must be an essential part of the Church's mission and of our own work. We anticipate that measures developed to enhance Latina leadership will offer an adaptable model for creating a welcoming, supportive ethos for minority women who are also marginalized.

*Gender mainstreaming in church-restructuring processes.*

Reviewing Church restructuring proposals for their gender implications is critical to ensuring that proposals are just and equitable. This, however, is only a first step. We also recommend gender mainstreaming in all considerations and deliberations, and we urge that gender budgeting also be pursued. We stand ready to assist with substantial gender mainstreaming and budgeting so that restructuring initiatives will adequately and justly address women's needs.

*Advocate and advise other CCABs, networks, and church groups.*

In every aspect of our work, we will seek to continue and broaden our collaboration with Church bodies that share our concerns. Issues of importance to women — such as immigration, poverty and economic justice, human trafficking and other forms of violence, incarceration, health care and wellness, and the effects of media manipulation — cannot be fully effectively addressed without the contributions of many.

**PROPOSED RESOLUTIONS**

**RESOLUTION A031: CONTINUE TO DEVELOP THE SEARCH TOOLKIT**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Office of Transition Ministries, the Office of Pastoral Development, and the Executive Council Committee on the Status of Women to continue development of search toolkit resources for female clergy and Church leadership discernment committees through the 2016-18 triennium; and be it further

*Resolved*, That the 78th General Convention extend appreciation for support of the search toolkit at the 77th General Convention, and call on bishops and other diocesan leaders to urge the search toolkit's use by search committees and transition ministries and to promote its availability for use among female clergy; and be it further

*Resolved*, That the 78th General Convention request the Joint Standing Committee on Program, Budget and Finance to restore the funding passed by the 77th General Convention and to grant additional funding for the expanded development of online and other necessary resources.

EXPLANATION

Despite strides made toward gender equality in ordained ministry within individual dioceses and settings, overall trends show that women continue to be significantly underrepresented as bishops, as rectors of large parishes with paid ministerial staff, and in other senior-level positions.

Moreover, ordained women, on average, earn only about 86 cents for every dollar their male counterparts earn, according to 2012 Church Pension Fund data. Gender gaps have persisted for more than twenty years and are seen among young clergy, among full-time parish associates, and in other groups, suggesting that inequalities become structured into the career course shortly after ordination.

Taken together, these trends point to the need for the Church itself to strive to be more just at all levels of ordained ministry for women, as for men, in accord with the Church's mission to transform unjust structures.

The search toolkit represents an opportunity to help remediate gender inequalities by making resources available not only to female clergy seeking to develop and advance their careers, but also to those bodies sponsoring search and transition processes, to promote an egalitarian context upon which to make objective decisions about calling and hiring processes.

Although the 77th General Convention passed the Search Toolkit resolution (A143), it did not foresee the subsequent removal of funding and disruptions during the triennium that lengthened logistical planning and implementation. The toolkit is now officially anchored within the Church and offers a preliminary phase of resources.

However, much more needs to be done. Some resources, such as multimedia production and translation into Spanish, require professional and technical expertise beyond the scope of volunteer committees, and involve necessary costs.

A network infrastructure also needs development in the coming triennium for ongoing coordination, review, and sharing of helpful tools and resources. This network infrastructure will rely on existing links among transition ministers and a parallel network for ordained women.

RESOLUTION A032: ESTABLISH COORDINATOR POSITION FOR WOMEN'S MINISTRIES NETWORKS

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Domestic and Foreign Missionary Society to establish a staff position of Coordinator for Women's Ministries Networks; and be it further

*Resolved*, That this staff person be empowered to engage existing networks across the Church and establish new networks to train and mobilize women leaders, both lay and ordained; and to release women's leadership skills for the sake of the whole Church; and be it further

*Resolved*, That the 78th General Convention call on each Province to appoint a representative to work with the Coordinator for Women's Ministries Networks; and be it further

*Resolved*, That the 78th General Convention request the Joint Standing Committee on Program, Budget and Finance to make available sufficient budgetary monies to the Domestic and Foreign Missionary Society to

fund a Coordinator for Women’s Ministries Networks, as well as additional seed money for the development and implementation of a self-sustainable model of women’s ministries networks that will connect women across dioceses and provinces of the Church.

EXPLANATION

The Episcopal Church historically has acted in prophetic ways for the empowerment of women. In this generation, it has committed itself to the Five Marks of Mission. Yet given the persistent discrepancy in Church employment between male and female salary ranges, employment expectations, lack of church-wide consistency in just employment policies such as Letters of Agreements, interviewing policies, and maternity leave, the Church should now, therefore, focus on the fourth mark of mission that challenges it to become a more just structure for its female leadership.

Since the 2009 termination of the Office of Women’s Ministries, little has been done to address women’s ministries in a coherent and systematic manner other than through the work of the Executive Council Committee on the Status of Women and aspects that happen to fall into various staff portfolios.

Moreover, based on the most recently available (2012) Church Pension Fund data, little improvement over two decades has been made in eliminating gender gaps and inequalities in ordained ministry careers. In short, the Church’s leadership role in advocacy and women’s ministries has stalled.

A platform to support and sustain a multifaceted network of shared resources for women’s ministries, as well as to connect diverse women’s groups in the Church for sharing interests, concerns, and resources with one another, offers both local interactivity and church-wide engagement. Such networks are especially important for women in small or restructuring dioceses, or if active support for women’s ministries is otherwise lacking in their diocese.

A dedicated Women’s Ministries Network Coordinator to oversee the development and promotion of this platform is crucial. Without institutionalization, such efforts risk failure. The network is intended to be partly self-sustaining, with women in dioceses and provinces offering participatory support as they are able, and with the DFMS platform contributing resources and support as needed. It is anticipated that this platform will offer ongoing support for the search toolkit among the sharing of other women’s ministries resources.

RESOLUTION A033: SUPPORT LATINAS IN ORDAINED MINISTRY

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Missioner for Hispanic/Latino Ministries to work with the Justice and Advocacy Ministries office, and diocesan and provincial multicultural missioners, to discern and recommend steps to empower Latinas for ordained leadership in the Church; and be it further

*Resolved*, That the 78th General Convention direct the Missioner for Hispanic/Latino Ministries to work with the Office of Transition Ministries, the Office of Justice and Advocacy Ministries, and diocesan and provincial multicultural missioners to review canons, policies, and practices related to the formation and ordination processes and to eliminate gender and cultural biases that mitigate against the ordination of Latinas; and be it further

*Resolved*, That the 78th General Convention request the Joint Standing Committee on Program, Budget and Finance to make available funding to seed the development of ordained Latina leadership.

**EXPLANATION**

Commitment to Latina ministry development is grounded in the first, second, third, and fourth marks of mission: proclaiming the Good News; teaching, baptizing, and nurturing new believers (including the goal of strengthening Province IX for sustainable mission); responding to human need in loving service through making missionary service available for Latinas as well as other young people; and seeking to change unjust structures that marginalize and hinder the full ministry of the Body of Christ. Latinas hold potential to reach out, teach, baptize, and nurture new believers; and to start viable new congregations.

Audit and examination of discernment and formation processes for Holy Orders is necessary to remove dominant cultural and gender biases and to clarify implicit expectations in order to make those processes more accessible and welcoming for Latinas and for those from other culturally distinct groups. Clarifying understandings and expectations will enhance multicultural sensitivity. These steps are also likely to provide additional benefits for making the process of vocational development more equitable for all.

**RESOLUTION A034: SUPPORT LATINAS IN LAY MINISTRY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Missioner for Hispanic/Latino Ministries to work with the Office of Justice and Advocacy Ministries, and with diocesan and provincial multicultural missionaries, in supporting programs to develop leadership skills for Latina youth and young adults, on a par with those for offered for boys and young men; and be it further

*Resolved*, That the 78th General Convention request the Joint Standing Committee on Program, Budget and Finance to make available funding to seed the development of Latina lay leadership.

**EXPLANATION**

Commitment to Latina ministry development is grounded in the first, second, third, and fourth marks of mission: proclaiming the Good News; teaching, baptizing, and nurturing new believers (including the goal of strengthening Province IX for sustainable mission); responding to human need in loving service through making missionary service available for Latinas and other young people; and seeking to change unjust structures that marginalize and hinder the full ministry of the Body of Christ.

Latinas with expertise in ministry — both lay and ordained, and both young and older adult — hold potential to reach out, teach, baptize, and nurture new believers; and to start viable new congregations.

Lay leadership development among Latinas is crucial for mission and ministry. Research on Christian religiosity in North American and Latin American contexts shows that women are more likely than men to join religious communities and bring their families into the congregation. Supporting Latina lay ministry makes mission sense.

Often women’s leadership development can be overlooked due to assumptions that women are not interested or that they should remain in supportive roles. Resources and support that focus on the distinct needs of women, on a par with those for men, will ensure that women are not ignored or overlooked.

## Budget

### The 2013-15 Triennium

For this triennium, the Executive Council Committee on the Status of Women received \$15,000. We chose to spend our limited financial resources in two ways: one, on a face-to-face meeting in September 2013; and two, on web-conference capability through an Adobe Connect license. Both expenditures were critical to the success of our work. As of September 2014, we had a balance of about \$5,200.

**The 2016-18 Triennium**

For the upcoming triennium, the Committee proposes \$50,000 for its work. This represents a 17 percent decrease in the amount requested for the last triennium, yet also acknowledges that the Committee’s mandates involve significant expenses beyond meetings, such as costs associated with the development of content for a search toolkit and resources for fighting human trafficking. We also believe that we will accomplish more if we can meet as a full Committee face-to-face more than once during the triennium. Our budget proposal will fund our work in the following areas:

*Meetings of the ECCSW, \$25,000*

The full Committee plans to meet face-to-face twice during the next triennium. This will require \$10,000 for 2016 and \$10,000 for 2017. Furthermore, the Committee expects that its subcommittees and task forces also will meet in person and plans to purchase Adobe Connect licenses for web conferencing. These meetings will require an additional \$5,000.

*Fighting Human Trafficking, \$5,000*

The Committee plans both to continue developing resources on human trafficking and to participate in the Do42 Coordinating Committee.

*Supporting Women’s Ministries, \$10,000*

The Committee’s work to support women’s ordained and lay ministries will include developing substantial content for the search toolkit, pursuing Women’s Indaba, and creating resources specifically for Latinas and other marginalized women within the Church.

*Ensuring Gender Mainstreaming and Budgeting, \$10,000*

Especially as the Church continues with restructuring efforts, the Committee plans new work toward assessing the different implications for women and men of any planned action and in developing educational resources on gender mainstreaming and budgeting for church-wide use.

# EXECUTIVE COUNCIL COORDINATING COMMITTEE — RESOLUTION 2012-B019

## Membership

The Rev. John Kitagawa, *Chair*  
The Rt. Rev. Thomas Breidenthal, 2015  
The Rt. Rev. Philip M. Duncan II, 2015  
Ms. Lelanda Lee, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Mr. Alexander Baumgarten, *Staff*

## Summary of Work

**Mandate:** Established pursuant to AN-008, adopted by Executive Council in February 2013, to assure the effective and thorough implementation of the policies adopted by the 77th General Convention through Resolution B019 and referred to multiple interim bodies. Representation from specific committees and commissions and a report to Executive Council for inclusion in its Blue Book report were mandated.

### I. SUMMARY OF ACTIONS

The summary below is in response to Resolution B019 and refers to the resolution's clauses and resolves.

**Lines 1 through 8** “regret the lack of progress in negotiations between Israelis and Palestinians toward a just and peaceful resolution of the long-standing conflict [‘the Conflict’] between the two peoples.” We have seen the devastating result of this lack of progress, particularly during the summer of 2014. If the Executive Council were to advance a resolution for the 2015 General Convention, stronger language than “regret” might be used.

**Lines 9 through 14** commend the Presiding Bishop's leadership. The Coordinating Committee would support further affirmation if there is to be a 2015 resolution.

**Lines 15 through 20** contain the first action item, “to engage actively in the discipline of advocacy, education, and prayer for peace between Israelis and Palestinians, as well as in the provision of humanitarian aid that promotes peace and reconciliation.” The Office of Justice and Advocacy Ministries (JAM) has actively responded to this call for advocacy and action. In Lent 2014, JAM published a seven-part educational series, “Peace in the Land of the Holy One,” to draw Episcopalians into a comprehensive study of the Conflict and concerted advocacy toward a two-state solution. JAM further engaged, through its work with Churches for Middle East Peace and in support of the Presiding Bishop's ministry of advocacy (including in the National Interfaith Leadership Initiative), a steady pattern of direct congressional, White House, and State Department advocacy in response to the positions of The Episcopal Church adopted through the General Convention.

JAM sponsored travel for staff and a member of the B019 Coordinating Committee in a “dual narrative” study trip to the Holy Land in November 2013, and further supported and accompanied three primatial visits to the Episcopal Diocese of Jerusalem during the triennium, each of which contained an advocacy and educational component for the wider Church. Finally, at the time of writing, JAM is preparing to launch, later in the triennium, a comprehensive page on the website of The Episcopal Church providing study materials and advocacy resources to Episcopalians.

**Lines 21 through 25** “affirm the importance of interfaith dialogue, and decries religious extremism and fundamentalism.” The Convention did not mandate any specific action for the triennium.

**Lines 26 through 30** “urges all congregations to seek, over the next triennium, to engage with local Jewish and Muslim congregations to study peace with justice in the Middle East, and urges that the theologies that inform the conversations on peace with justice in the Middle East be particular focuses of attention.” While this section is primarily directed at local congregations, the Domestic and Foreign Missionary Society staff lived, in the spirit of the request, through participation in a series of high-level, Jewish-Christian-Muslim dialogues about Holy Land issues; and further engaged both formal and informal bilateral dialogues with Muslim leaders and groups and with Jewish leaders and groups. The Presiding Bishop’s office sponsored additional leadership-level dialogue through invitations to prominent Muslim and Jewish leaders to spend extended time with the House of Bishops during the triennium (and in turn, receiving from two major Jewish organizations an invitation to be address high-level gatherings of their community.)

**Lines 31 through 37** asks “the Theology Committee of the House of Bishops, the Standing Commission on Anglican and International Peace with Justice Concerns, the resources of the Episcopal seminaries, and the Advocacy and Networking Committee of the Executive Council be called upon to support, through the triennium, the Jewish, Muslim, and Christian study on peace with justice in the Middle East and to produce an annotated bibliography of resources to be posted on the website of The Episcopal Church.” This was an unfunded directive of the Convention. The House of Bishops Theology Committee declined to engage the request of this resolution to produce an annotated bibliography due to workload and resource scarcity. At the time of writing, the Presiding Bishop and staff continue to explore ways to identify resources to fund the work of a scholar of note, with the goal of presenting a draft bibliography to the Theology Committee for their consideration before the end of the triennium.

**Lines 38 through 42** refer to the “resolve” in Lines 26-30. Without funding or staff, a systematic empowering and resourcing of local peace studies initiative was not possible. By extension, collecting and summarizing local reports for General Convention edification was not possible.

**Lines 43 through 47** requested “that the Presiding Bishop develop an interfaith model pilgrimage composed equally of Episcopalians, Jews, and Muslims in order to further encourage the travel of pilgrims and witnesses to the Holy Land in order to experience the multiple narratives of the diverse peoples who call the land their home;” the Presiding Bishop, in partnership with a senior Jewish leader and a senior Muslim leader will lead, in January 2015, the pilgrimage requested by the General Convention. It will be preceded by shared study of sacred texts by the leaders and participants; and will be followed by advocacy and educational materials designed to engage all three traditions in a united program of advocacy toward a two-state solution, and by suggestions for how such pilgrimage might be carried out at the local level.

**Lines 58 through 61** commend the work of the American Friends of the Episcopal Diocese of Jerusalem and of the Good Friday Offering to the Church. Any 2015 resolution would appropriately continue to support this work.

**Lines 48 through 57, and 62-65** “affirm positive investment as a necessary means to create a sound economy and sustainable infrastructure in the West Bank and the Gaza Strip ... [and that] as a component of this Church’s support for positive financial investment in the Palestinian territories, the General Convention urge the Economic Justice Loan Committee to consider a loan of at least \$200,000 to strengthen the economic infrastructure of the Palestinian territories.” In partnership with the staff of the Domestic and Foreign Missionary Society, the Economic Justice Loan Committee in 2013 thoroughly studied the request for economic investment in the Palestinian Territories and, as a result, invested \$500,000 — more than double the amount called for by the Convention — in a Certificate of Deposit in the Bank of Palestine that empowers community-level business opportunities and economic empowerment in the Occupied Territories.

Based on that investment, at least one diocese has made its own investment, while others have reported that they are studying the matter.

## **II. HISTORICAL PERSPECTIVE**

The following remarks offer some historical perspective on the broader context of The Episcopal Church's engagement in Israel, Palestine, and the Middle East.

Since at least 1979, the General Convention has passed a variety of resolutions at each successive Convention on the subject. Some clear themes have been consistently raised for the past 36 years, including our support for a negotiated two-state solution in which a universally recognized and secure state of Israel exists side-by-side with an independent and viable Palestinian state, with a shared Jerusalem as the capital of both. Also consistent has been the Church's condemnation of violence by all parties. The Church's response to other dynamics of the conflict, such as how international partners both governmental and nongovernmental should engage economically with the parties, has varied and evolved as the conflict itself has varied and evolved.

A list of resolutions can easily be obtained from the Archives of the Episcopal Church. Some of the concurred resolutions have addressed significant topics such as: "Urge a Full accounting of the Use of Foreign Aid in the Middle East (1991-A149)"; "Support a Two-State Solution for Israel and the Palestinian People (1991-A147)"; "Recognize Jerusalem as the Capital of Both Israel and Palestine (1997-A107)"; "Oppose Construction of the Israeli Security Wall (2003-D081)"; "Urge Israel to End Policy of Demolition of Palestinian Homes (2003-D008)"; "Pray for the Wall around Bethlehem to Come Down (2009-A037)."

The Convention has also rejected several significant resolutions on: "On the Topic of Israel's Occupation of Palestine (2006-A012)"; "On the Topic of Peace Between Israel and Palestine (2006-A011)"; and "On the Topic of Peace and Statehood in Historic Palestine (2009-B027)."

It must be noted that some Episcopalians have strongly advocated for a boycott of investments in Israeli businesses as a way to pressure the Israeli government to change some of its policies toward Palestine. The boycotts of South African businesses are often cited to support this approach. The Church rejected divestment in 2006 through a resolution of Executive Council after the Council, in partnership with the Church's Social Responsibility in Investment Committee (now called the Committee on Corporate Social Responsibility), spent more than a year studying the issue.

Instead, the Council affirmed constructive corporate dialogue and positive investment. That policy was further clarified by the Executive Council in 2013 in response to inquiry from some Episcopal advocates of boycott, divestment, and sanctions when the Council passed a resolution holding that "this Church does not support boycott, divestment, and economic sanctions against the state of Israel nor any application of the Church's corporate-engagement policies toward such ends.

## **III. LOOKING FORWARD**

The summary of triennial actions related to B019 suggested several actions that were hampered by the lack of funding and of needed personnel support. The 2015 General Convention could advance this work and the cause of peace in Israel and Palestine by providing the funding to achieve the underachieved action items, as well as by sharing the fruits of the January 2015 Interfaith Pilgrimage as one model for local interfaith conversations and study.



# EXECUTIVE COUNCIL COORDINATING COMMITTEE — RESOLUTION 2012-D042

## Membership

Ms. Laura Russell, *Convener*, 2015  
The Rev. Devon Anderson, 2015  
The Rev. Raynald Bonoan, 2015  
Ms. Martha Gardner, 2015  
Mr. Alan Murray, 2015  
Dr. Lucille Pilling, 2015  
Mr. Kendall Seal, 2015  
Ms. Deborah Stokes, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Ms. Jayce Hafner, *Staff*  
Ms. Lynnaia Main, *Staff*

## Summary of Work

**Mandate:** Established pursuant to AN-026, adopted by Executive Council in February 2014, to assure the effective, thorough, and collaborative implementation of the policies adopted by the 77th General Convention through Resolution D042 and referred to multiple bodies. Representation from specific committees and commissions and a report to Executive Council for inclusion in its Blue Book report were mandated.

The mandate for Resolution D042 states that the 77th General Convention re-commit to protecting victims of human trafficking, particularly women and children, by continuing to support legislation and action oriented to recovery and reintegration of trafficking victims into society; commend the work of the Anglican Women's Empowerment and the Executive Council Committee on the Status of Women in addressing human trafficking as a national and international priority and recommends that all dioceses utilize the resources of these two organizations to provide education on this insidious form of modern day slavery; the provinces of The Episcopal Church appoint a person from each province who will coordinate with the Commission of the Status of Women, or another appropriate committee of Executive Council to allow sharing of additional vital resources on human trafficking; each province of The Episcopal Church begin a dialogue with another province to recognize how both domestic and international trafficking affects the peoples of their provinces.

**Meetings:** The Committee was appointed in late April of 2014, and a convener was appointed in early May. The Committee began with email introductions and had its first conference call on July 1, 2014. During this call, after much discussion, it was decided a needed resource was a web-based toolkit. This toolkit, which would be placed on a web page with other resources, would be not only for those interested in learning more about the issue of human trafficking, but also for those working with survivors or those eager to work with survivors. It would list who, in each province, is working with survivors and could be a local resource for others. This list of people would come from the current list of coordinators named for each province.

In following the spirit of Resolution D042, this web page and toolkit could reach all areas of the Church and could be translated into the many languages spoken by The Episcopal Church. We know that human trafficking exists everywhere, and that no one area can combat trafficking alone. The resolution sought to bring together people — people at all stages of their learning about human trafficking, from ones eager to

begin to understand this scourge, to those who already work with survivors. We hope to do this through this web page.

The resolution also discussed Provincial representatives. During the first call, we agreed to ask our respective provinces for coordinators who would be willing to serve as links between the Committee and the wider Church. The coordinators would also have their information in the toolkit. As of this writing, we have identified coordinators from several provinces, but are still seeking additional coordinators.

The initial meeting ended with a decision to promulgate a survey to the Church regarding its awareness of, and work with, human trafficking and its survivors. Each member was tasked with creating questions for this survey.

The Committee met a second time, on July 28, 2014 via conference call. During this time we discussed the survey. The survey needed many elements: an opening for understanding of the issue; questions about knowledge, efforts taken, policy concerns, and challenges; and a closing for further information. The questions for the survey were reviewed, and members were chosen to craft the opening and closing pieces of the survey. We are currently finalizing the survey and hope for its widespread dissemination.

After the survey is finalized, we hope to utilize the Listservs already in place to promulgate it. There is also a hope that the toolkit and web page can be hosted by either a current organization connected to The Episcopal Church or on The Episcopal Church website.

**Conclusion:** Due to the Committee's recent beginnings, we are seeking to continue our work for the rest of this triennium. We have begun a fruitful discussion of the issue of human trafficking and the work that is already being done. For the rest of this triennium, we hope to finalize and disseminate the survey, tabulate the results, and create a webpage and toolkit to showcase resources available for anyone interested in this issue.

## Budget

This Committee was not allocated any funds. All meetings have been by conference call. In the future, if the website is approved, funds will be needed for its creation, maintenance and translation of materials.

# EXECUTIVE COUNCIL ECONOMIC JUSTICE LOAN COMMITTEE

## Membership

Ms. Lindsey W. Parker, *Chair*, 2015  
Dr. Scott Bader-Saye  
The Rev. Jane Gould, 2015  
The Rev. Canon Gregory Jacobs, 2015  
Mr. William B. McKeown, Esq., 2015  
The Rt. Rev. Eugene Sutton, 2015  
Mr. Warren Wong, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Mr. John Johnson, *Executive Council Liaison*  
Mr. T. Dennis Sullivan, *Investment Committee Liaison*

### *Changes in Membership*

Dr. Scott Bader-Saye stepped down from the Committee in January 2014. He was not replaced.

## Summary of Work

**Mandate:** To oversee the assets set aside by General Convention and Executive Council for loans that support greater economic justice by enhancing people's ability to improve their economic well-being.

In 1998, the Executive Council created the Economic Justice Loan Committee (EJLC) to oversee two predecessor economic justice programs and the management of \$7 million of investment assets of the DFMS. The allocation of this money reflects the Church's desire to use some of its own resources, on a revolving basis, in support of an investment portfolio supporting economic justice by providing credit to institutions and organizations that may not be able to access the regular capital markets, but who have worthy community development goals and projects, including housing, social services, and small business development. The goal of these investment funds is to generate income, but also to further the Church's social-justice purposes. This form of economic justice hopes to enhance people's ability to improve their own economic well-being and to empower them through the use of economic resources.

**Meetings:** EJLC currently meets bi-monthly by telephone conference to review and approve loan applications from community development financial institutions (CDFIs) and to conduct other business as necessary.

The EJLC continues, since 2002, has and continues to employ the Opportunity Finance Network (OFN) (contract renewable annually) as an outside consultant to assist in underwriting (the analytic process of risk assessment), to review these community development organizations and their loan applications, and to recommend investment opportunities appropriate for the EJLC portfolio. OFN is a national network of more than 200 CDFIs that also operates a financial consulting business assisting insurance, financial services, and faith-based investors in building community development investment portfolios. The DFMS Treasurer's Office is responsible for the ongoing monitoring of the existing loan portfolio and the compliance of the borrowers.

As in the past, the EJLC portfolio is currently invested in community development loan funds as well as in direct deposits (such as certificates of deposit) with financial institutions. EJLC does not make any direct project loans. EJLC makes loans only to intermediary financial institutions, which, in turn, lend to end borrowers. The borrowing institutions make capital available to organizations and people who have

historically had a more difficult time accessing capital markets. Funds are typically made available for affordable housing, job creation, community economic development including community facilities, small business, and micro-enterprises. This is important, because it greatly reduces the risk of the portfolio through diversification, and also because community development financial institutions typically provide financial training and technical assistance along with financial capital. EJLC currently has a portfolio of both domestic and international investments.

As evidenced by the Loan Program Report that follows, loans generally range in size from \$100,000 to \$500,000, and they generally range in term from three to five years. Over the last triennium, at any point in time the portfolio has typically held between 12 and 18 investments.

During the triennium, EJLC reviewed and acted on a number of applications. As of September 30, 2014, the loan portfolio consisted of \$3,775,000 in loans outstanding, \$860,000 in deposits placed, and \$500,000 in loans committed but not yet disbursed. Total funds committed were \$5,135,000, of which \$3,010,000 were placed during this triennium. Funds currently available for investment are \$1,567,376. This remaining amount of funds available for investment also reflects a write-off of approximately \$300,000 (Delta/Mississippi) that was required several years ago. Reflecting the revolving nature of the portfolio, a number of additional loan applications are in the current pipeline.

The following are examples of loans and deposits made by EJLC during the last triennium:

*Fonkoze (June 2013): \$150,000*

Fonkoze is Haiti's largest micro-finance institution and has been operating in the country for more than 20 years. More than 40 percent of Haitian households are headed by women, and the work of Fonkoze focuses primarily on that population in rural Haiti. The Committee has looked for a way to invest in Haiti for some time, particularly after the earthquake of 2010. Without Fonkoze, many of its clients would have no access to micro-credit or the other financial services provided by its related organization, Sevis Finansye Fonkoze (SFF), such as savings and money transfers.

*Bank of Palestine Certificate of Deposit (March 2013): \$500,000*

For some time, the Committee has looked for a way to make an affirmative investment in Palestine, but it was never able to identify a suitable CDFI opportunity. Convention Resolution B019 in July 2012 reaffirmed the Committee's need to look for an investment opportunity. The Church's Committee on Corporate Social Responsibility has been looking into this issue for quite some time. This is the first positive investment made by this Church in the economy of the Occupied Palestinian Territories. The Bank of Palestine is a proud signatory of the UN Global Compact, a universally accepted set of principles that align business with socially responsible financial practices.

*New Hampshire Community Loan Fund (August 2013): \$500,000*

One of the nation's first community development loan funds, NHCLF has been providing loans in its community for more than 40 years. It has been a leader in providing financing to resident-owned, manufactured-home communities, thereby providing a permanence of housing not typically seen among this population. This is at least the third time that DFMS has made a loan to NHCLF.

*Shared Interest (2014): \$100,000*

EJLC renewed its investment in South Africa through Shared Interest. It was particularly meaningful to do this, as South Africa is celebrating its 20th year of democracy in 2014. Shared Interest, through its local partner organization Them bani, has benefited more than two million low-income, black South Africans. This is another repeat borrower in the portfolio.

### *Appalachia*

With the assistance of OFN and the Treasurer's Office — which made an effort to reach out to local bishops to discuss both need and opportunity — a number of investment opportunities serving this area have been identified and are being vetted at this time.

The Committee continues to work toward its goal of increasing the percentage of the portfolio that is deployed. With that in mind, we have spent some of our Committee time talking more holistically about portfolio construction and diversification as measured by type of loan, size of loan, type of borrower, location or service area, geography, and population being served. We also recognize the importance of being diversified across the country, so as to reflect the Church's reach and the needs of all communities. The Committee has also endeavored to publicize its work with press releases and web postings. The work of this Committee would not be possible without the dedication and support of Margareth Crosnier de Bellaistre and Kurt Barnes in the Treasurer's Office.

### Budget

Due to budget constraints, the Committee continues to look for ways to reduce its expenses. This has included the Treasurer's Office's assuming more responsibility for the portfolio — in particular, ongoing monitoring — so that we could further cut the expenses of our outside consultant, OFN.

The Committee was not able to hold a face-to-face meeting this triennium as it has in the past. All the work was conducted by telephone. If the budget for the next triennium allows for it, the Committee would like to hold a two-day, in-person meeting primarily for training new members.

# EXECUTIVE COUNCIL INVESTMENT COMMITTEE

## Membership

Mr. T. Dennis Sullivan, *Chair*, 2015  
Mr. Michael Kerr, *Vice Chair*, 2015  
Mr. David Lorenzo Álvarez-Roldan, 2015  
Mr. N. Kurt Barnes  
Ms. Tess Judge, 2015  
The Rt. Rev. Rodney Michel, 2015  
Ms. Lilian Shackelford Murray, 2015  
Ms. Maibeth Porter, 2015  
Mr. Ronald Radcliff, 2015  
Mr. Benjamin Waring Partridge, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rt. Rev. Stacy Sauls, *Staff*  
Ms. Margareth Crosnier de Bellaistre, *Staff*

## Summary of Work

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

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

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

The portfolio is diversified and continues to be focused on equities, with approximately 65 percent invested in equities; 15 percent invested in fixed income; and 20 percent in convertibles, hedge fund of funds, and real estate. The Committee continues to evaluate portfolio return, while maximizing risk protection by reducing U.S. equity allocation and increasing non-US equity and alternative investments.

Long-term performance of the trusts has been exceptional, with annual returns, after all fees and expenses, of 7.7 percent for the 10 years ending June 30, 2014, which ranks in the top 20 percent of all foundations with assets over \$50 million, as tracked by the InvestorForce Performance Reporting Network (subsidiary of MSCI Inc.).

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

- endowment funds held and managed by DFMS and benefiting DFMS;
- funds owned by and benefiting other Episcopal and Anglican entities in the United States and abroad, for which DFMS is the trustee;

- custodial funds held and managed by DFMS, but owned by and benefiting other Episcopal and Anglican entities in the United States and abroad.

There are almost 1,100 trust funds maintained in a common portfolio, managed by 18 investment managers and participating on a pro-rata basis in all returns of that portfolio. The Society is also trustee for 19 charitable trusts, which are separately invested and managed, but are not commingled with any other fund, as required by law. The Treasurer's Office publishes an annual trust fund book, and the Investment Committee reports regularly to the Executive Council.

**Meetings:** The Committee meets four times each year, generally in person, to review performance and discuss current investment issues. The Committee's expenses are charged to the income of the endowment.

# EXECUTIVE COUNCIL TASK FORCE ON THE ANGLICAN COVENANT — RESOLUTION 2012-B005

## Membership

Canon Rosalie Simmonds Ballentine, Esq., *Convener*, 2015  
The Rev. Dr. R. Stan Runnels, *Clerk*, 2015  
The Very Rev. Samuel G. Candler, 2015  
The Rt. Rev. Ian Douglas, 2015  
The Rev. Canon Dr. Charles K. Robertson, 2015  
The Most Rev. Dr. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*

### *Representation at General Convention*

Bishop Ian Douglas and Canon Rosalie Simmonds Ballentine are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** The 77th General Convention of the Episcopal Church passed resolution B005: Ongoing Commitment to the Anglican Covenant Process, which required the Presiding Officers to appoint a task force of the Executive Council to 1) “continue to monitor the ongoing developments with respect to the Anglican Covenant and how this church might continue its participation,” and 2) “report its findings and recommendations to the 78th General Convention.”

**Meetings:** The B005 Task Force met by telephone conference call twice during the triennium (December 13, 2013 and August 26, 2014) and otherwise communicated by exchange of email. Our deliberations benefited especially from the Anglican Communion contacts of The Rev. Charles Robertson, Canon to the Presiding Bishop; as well as from insights provided by our Anglican Consultative Council Representative, The Rt. Rev. Ian Douglas. Reports were made to the Task Force on all meetings of the Anglican Consultative Council (ACC) during our triennial period as well as on other significant leadership meetings concerning the Anglican Communion.

### **PROPOSED RESOLUTIONS**

The B005 Task Force recommends the adoption of the following resolution by the 78th General Convention:

#### **A040: AFFIRM RESPONSE TO THE ANGLICAN COVENANT PROCESS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church affirm our common identity and membership in the Anglican Communion as expressed in the preamble and first three sections of the Anglican Communion Covenant; and be it further

*Resolved*, That the 78th General Convention direct The Episcopal Church's members of the Anglican Consultative Council to express our appreciation to the 16th meeting of the Anglican Consultative Council (ACC16, Lusaka 2016) for the gift of inter-Anglican conversation and mutuality in God's mission engendered by the Anglican Communion Covenant process.

#### **EXPLANATION**

Pursuant to the charge given the B005 Task Force, we monitored Anglican and ACC activities regarding the Anglican Covenant process and believe this resolution to respond appropriately to the current status of this process in Anglicanism generally and the ACC specifically. This resolution has no budgetary implications.



## Budget

No funds were expended by the Task Force. The Task Force's charge expires at the end of the triennium, so no funds are requested for the next triennium.

# JOINT AUDIT COMMITTEE OF THE EXECUTIVE COUNCIL AND THE DFMS

## Membership

The Rev. Robert T. Brooks, *Chair*, 2015  
The Rt. Rev. Jeff Fisher, 2015  
Ms. Nancy Koonce, 2015  
The Rev. Michele Racusin, 2015  
Ms. Rosanna Rosado, 2015  
Mr. Dennis Stark, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*

### *Retiring Committee:*

Mr. Arthur M. Bjontegard, Jr.  
Dr. Delbert C. Glover  
Ms. Diane B. Pollard  
The Rt. Rev. Rodney R. Michel

## Summary of Work

**Mandate:** To regularly review the financial statements relating to all funds under the management or control of the Council and the Society and to report thereon at least annually to the Council and the Society.

**Meetings:** The Audit Committee is charged to act as an oversight board. Serving as an independent, objective, check and balance to the Executive Council, the Committee met four times in both 2013 and 2014 — three times each year at the Church Center, and once each year by conference call. As prescribed in the Committee’s Charter, the previous members served until successors were appointed. The Committee as currently constituted was appointed in August 2012. A representative from Episcopal Relief and Development, whose financial reporting is consolidated with that of the Society, attended all meetings of the Committee.

According to its chartered responsibilities, the Committee reviewed:

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

The Committee also reviewed and revised its Charter annually. The Committee is responsible for performing other special reviews as requested by the Executive Council and for meeting separately on a regular basis with representatives of the independent auditors and with senior executives of the Society.

Unqualified opinions were received from the independent auditing firm Grant Thornton for the 2012 and 2013 financial years. The Executive Council accepted these reports upon recommendation from the Audit Committee. The results of the 2014 audit are expected to be received at the Committee's May 2015 meeting, in time for the Committee to recommend its acceptance to the Joint Standing Committee on Program, Budget and Finance at the General Convention. The Committee continues to work closely with Grant Thornton, which continues as the independent auditors for fiscal year 2014.

During the triennium, the Committee continued its focus on "best practices" in the not-for-profit sector, including:

- Soliciting proposals, reviewing, and selecting an independent auditing firm
- Reviewing the Society's Conflicts of Interest Policy
- Reviewing the Grants Auditor's work with dioceses of Province IX
- Reconfirming that original receipts must be presented in order to be reimbursed for travel expenses
- Engaging Grant Thornton to perform a review of the Navajoland Area Mission's accounting practices
- Reviewing analyses of the Society's core versus statutory financial statements

## Budget

The Committee was budgeted a total of \$20,000 for the 2013-2015 triennium. The Committee expects to meet the same number of times in the coming triennium. The Committee will consider engaging the services of a consultant(s) to augment its work during the coming triennium. Doing so would necessitate budgeting an additional \$100,000, for a total budget of \$120,000 for the triennium 2016-2018.

# UNITED THANK OFFERING BOARD

## Membership

Ms. Barbara Schafer, *President*, 2015  
Ms. Marcie Cherau, *Vice-President*, 2015  
Ms. Dena Lee, *Secretary*, 2015  
Mrs. Susan Page Howland, *Financial Secretary*, 2015  
Ms. Olga Arevalo, 2015  
The Rev. Sarah Carver, 2015  
Ms. Margaret (Peg) Cooper, 2015  
Ms. Anne Gordon Curran, 2015  
Ms. Grace Henderson, 2014  
Ms. Lois Johnson Rodney, 2015  
Ms. Sandra Squires, 2015  
The Rev. John Tampa, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. Marion Luckey, *Executive Council Liaison*  
The Rev. Heather Melton, *Staff Liaison*

## Summary of Work

**Mandate:** To 1) promote an attitude and culture of thankfulness within The Episcopal Church, 2) assist in raising awareness of UTO, 3) encourage ingathering offerings to support mission throughout the world, 4) recommend priorities and criteria for current-year grants, 5) solicit and evaluate grant applications based on said criteria, 6) recommend approval of said grants to the Executive Council of The Episcopal Church through The Episcopal Church Finance and Mission Departments, and 7) establish and nurture relationships with those who are awarded grants through activities including, but not limited to, periodic site visits.

The United Thank Offering (UTO) Board, rooted in prayer and guided by the principles of the Theology of Thankfulness and the Five Marks of Mission, gave priority to the following areas during the 2012-2015 triennium:

- Governing Documents
- Granting the Annual Ingathering
- Supporting the Grassroots Network
- Increasing the Annual Ingathering
- New Initiatives for the 125th Anniversary of UTO

**Meetings:** The Board met in person 11 times: in Oklahoma in 2012; in Florida, Virginia, New York, and Massachusetts in 2013; in Louisiana, Missouri, and Maryland in 2014; and in Texas, Utah, and New Hampshire in 2015. During each meeting, the Board conducted business, visited or learned about grant sites, and met with local Episcopal Church Women and United Thank Offering volunteers. Members of the Board also met online in small groups to address the work set before the Board between meetings. Members of the Board also met online in small groups to address the work set before the Board between meetings.

**Governing Documents:** The Board began the triennium developing the necessary governing documents to support the ministry and work of the Board following the study period, which concluded with INC-055. After much work, conflict, prayer, and several meetings with DFMS staff, members of Executive Council, the Presiding Officers, the Board, and the Executive Council approved bylaws and a memorandum of

understanding in February 2014. These documents were developed with prayer and a spirit of discernment that the furtherance of the United Thank Offering within The Episcopal Church could best be served by this revitalized structure and with greater cooperation between the Board and the DFMS. The Board developed other internal governing documents, such as Policies and Procedures, Orientation Handbook, and materials for provinces to use when soliciting applications for Board membership in order to further develop transparent modes of operation and ministry.

### **Granting the Annual Ingathering**

During this triennium, the Board has dedicated a great deal of time to reviewing the processes and systems involved with granting the annual ingathering. The application focus has been on the Five Marks of Mission for the past three years. The Board has developed an online application system to decrease the amount of paper utilized in the past for the purposes of reviewing applications and expediting the grant-reviewing process. The staff transferred the database of grants to new, streamlined software, which allows for better management and follow-up on grants once they are approved for payment.

The Board, in the final year of the triennium, developed a new application as well as clearer criteria and timeline for granting to facilitate broader participation in the annual application process. Beginning with the 2014 ingathering, the Board began working with the Executive Council Standing Committee on World Mission to approve criteria for granting and the final list of awarded grants. It is our hope that in working with Executive Council, we will provide greater transparency for the process as well as demonstrate fiduciary oversight and partnership with Executive Council.

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

### **Supporting the Grassroots Network**

In 2014, the Board began to review the cost effectiveness of different styles of training that the Board had utilized historically to support local United Thank Offering Coordinators in carrying out their ministry of teaching the Theology of Thankfulness and hosting the annual ingathering. In preparation for the 125th Anniversary of the United Thank Offering and in recognition of the advice given in INC-055, all of the training materials and events were reviewed by the Board.

Historically, the Board hosted an annual weekend training event called Face To Face. Participants greatly enjoyed the opportunity to come together for fellowship and training; however, the cost of the training was quite high for the number of people who were able to attend. Given this information, the Board sent out a survey to all of the UTO volunteers and diocesan staff to assess what kinds of trainings would be helpful, and what materials were needed to support current volunteers and broaden the base of participation in UTO in the spring of 2014.

In June 2014, the Board began hosting monthly webinars, open to everyone, to address different topics pertaining to the United Thank Offering. The topics of the webinars addressed some of the major concerns that were raised in the survey. The webinars were successful and will continue to be one of the tools that the Board utilizes to support the current grassroots network of UTO as well as to broaden our base to reach parishes and individuals who have not yet participated in UTO. The Board decided to combine the Face To Face meetings with monthly Webinars and training workshops at the Triennial/General Convention to support the volunteer network.

In 2014, the Board also reviewed all of their publications. The Board created a blog to hold materials that could be easily downloaded to support UTO at both the parish and diocesan levels. Printed publications were also reviewed and revised to reflect the changing needs of the Church. The Board recognizes that we

can no longer assume that individuals know about UTO or have experienced it. The Board will endeavor to make every produced item a teaching tool about the Theology of Thankfulness and the United Thank Offering in order to increase participation in the ingathering.

Additionally in 2014, the Board began to work with the Communications Department of DFMS to create videos to teach about UTO and to share the story more broadly.

### **Increasing the Annual Ingathering**

Thanks to the Finance Department of DFMS and the UTO Staff, the Board received a comprehensive report regarding the first 124 years of the ingathering. This report allowed the Board to reflect on the overall health of the ingathering as well as on how it has progressed within individual dioceses since 2000. The Board discovered that when the ingathering amounts were adjusted for inflation that the ingathering peaked in 1964 and has been in steady decline since.

Historically, when we look at the events in the life of the Church, and particularly how the ministry of women was shifting starting in 1964, the decline makes sense. The Board takes this information very seriously, and its members have committed themselves to learning and providing initiatives to turn around the decline. In fact, the 2014 ingathering showed a 5.57 percent increase over the 2013 ingathering. Overall, the Board was pleased to discover that since the first ingathering, the United Thank Offering has collected and given away \$133,242,104.47. It is important to note that all funds contributed to the ingathering are granted the following year. None of the ingathering funds are used for the operational support of the Board or staff.

### **New Initiatives for the 125th Anniversary of UTO**

The Board is pleased to be celebrating the 125th Anniversary of the United Thank Offering at this convention. In the year leading up to convention, the Board undertook three new initiatives directly linked with celebrating the 125th Anniversary. These initiatives will be showcased throughout General Convention.

#### *125th Anniversary Special Grant to Bishops*

The first endeavor to celebrate the 125th Anniversary was held in the summer of 2014 through the offering of a special grant to bishops. Bishops were encouraged to apply for \$12,500 awards to support ministry that they were personally invested in within their diocese. Bishops from around the Church applied, and one diocese per province was selected to receive the award along with an award given to a ministry selected by the Presiding Bishop. These awards are now completed, and video about them will be shown at convention and then will be available on our web page.

#### *125th Anniversary Special Grant to Young Adults*

The second event to prepare for the anniversary of UTO was a special award for young adults in the Church. The Board offered a second special grant of \$1,250 to support new ministries that young adults were leading this year. Young adults were encouraged to fill out a brief application and make a short video to submit through their bishop; again, one per province would be selected. The top three young adult grants will be showcased at the 125th Anniversary United Thank Offering Dinner, and we are pleased that the three young adults who created these grants will join us for the dinner and discussion at Convention. After Convention, their videos will be available on our web page.

#### *The Julia Chester Emery, United Thank Offering/Young Adult Service Corps Internship*

Each year, part of the ingathering is used to support missionaries of The Episcopal Church. This annual grant is an important reminder of one of the first grants given by the ingathering to send missionaries to Japan. In 2014, the Board determined that it would like to have a deeper relationship with young adults as well as with the missionaries the ingathering is supporting. In a cooperative effort with Global Partnerships and the Mission Department of the Church, the UTO Board, with additional support from General Theological Seminary, created an internship to honor Julia Chester Emery. The UTO/YASC intern will spend one year

overseas as a YASC volunteer and then the second year will return to the United States to live at General Seminary and serve as an intern for the United Thank Offering and Global Partnerships. This young adult will have voice at Board meetings and will work with the Board to help engage different generations with the United Thank Offering. Our first intern will begin his or her New York year prior to Convention and will represent UTO at Convention. It is our hope that this new partnership will help strengthen ties, deepen and broaden participation in the United Thank Offering, and open up new opportunities for greater partnerships with other agencies.

**PROPOSED RESOLUTION**

A035: 125TH ANNIVERSARY OF THE UNITED THANK OFFERING

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church: Recognize and commend the work of the United Thank Offering volunteers, committee or board members, and staff for their ministry and message of thankfulness in daily life, demonstrated as gifts into Blue Boxes, which have totaled \$133,242,104.47 in the last 125 years to support mission and ministry throughout The Episcopal Church and The Anglican Communion; and be it further

Resolved, That as the United Thank Offering commences with the next 125 years of ministry, The Episcopal Church commends its significant contribution to the life of the Church and encourages all Episcopalians to participate in the United Thank Offering.

**UTO Board Priorities for the 2015-2018 Triennium**

*Supporting the Grassroots Network*

The Board will continue to evaluate and develop programs, materials, and events to meet the needs of individuals who are carrying out the work of the United Thank Offering. The Board will continue to develop ways to make materials relevant and accessible to all Episcopalians, with a special emphasis on finding creative ways to overcome obstacles for getting materials into dioceses that are not within the United States. The Board will also continue to explore ways to support our current participants and volunteers, while looking for ways to broaden the base of the United Thank Offering.

*Increasing the Annual Ingathering*

Recognizing the long-term decline of the annual ingathering, the Board will continue to monitor the amounts received and will seek ways to increase participation in the United Thank Offering, which will increase the ingathering. It is the goal of the Board to increase the ingathering over the next triennium by 20 percent.

*Granting the Annual Ingathering*

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

*Addressing Discrimination or Racism*

In keeping with the bylaws of the United Thank Offering Board, at least one member of the Board should be from each province of The Episcopal Church: the Board must meet once in one of the countries in which they have granted funds (preferably before the midpoint of the triennium); if needed, translators must be provided to ensure the full participation of all members; and the Board must affirm the Church in its decision to have diversity represented on the CCABs in accordance with General Convention 2006-A092.

## Budget

The UTO Board plans to meet nine times during the triennium, including once outside the United States. To accomplish its programmatic and grant-making responsibilities, the UTO Board will utilize projected income from the dedicated trust funds (based on the DFMS trust fund projected dividend) of \$629,633.75 for the triennium after subtracting the UTO Board's share of staff salaries and expenses.



# JOINT NOMINATING COMMITTEE FOR THE ELECTION OF A PRESIDING BISHOP

## Membership

Ms. Sally A. Johnson, Esq., *Co-Chair*, 2012-2015  
The Rt. Rev. Edward Konieczny, *Co-Chair*, 9/2013-2015  
The Rt. Rev. M. Thomas Shaw, *Co-Chair*, 11/2012-9/2013\*  
The Rev. Ruth Lawson Kirk, *Secretary*, 2012-2015  
The Rt. Rev. Lloyd Allen, 2015  
The Rev. Devon Anderson, 2015  
The Rt. Rev. Nathan Baxter,\* 2015  
Ms. Diane P. Butler, 2015  
The Very Rev. Ellis Clifton, 2015  
The Rev. Canon Amy Real Coultas, 2015  
Mr. William Fleener, Jr., 2015  
The Rt. Rev. R. William Franklin, 2015  
Ms. Pauline (Polly) Getz, Esq., 2015  
The Rt. Rev. Wendell Gibbs, 2015  
The Rt. Rev. Mary Glasspool, 2015  
The Rt. Rev. Duncan Gray, 2015  
The Rev. Lowell Grisham, 2015  
Ms. Josephine H. Hicks, 2015  
The Rev. David Hilton Jackson, 2015  
The Rt. Rev. William Klusmeyer,\* 2015  
The Rev. Canon Mally Ewing Lloyd, 2015  
Mr. Luis Eduardo Moreno, 2015  
Ms. Diane B. Pollard, 2015  
The Rev. Jose Francisco Salazar, 2015  
Ms. Nina Vest Salmon, 2015  
The Rt. Rev. Gordon Scruton,\* 2015  
The Rt. Rev. John S. Smylie, 2015  
Mr. Dante A. Tavolaro, 2015  
The Rev. Canon Dr. Sandye A. Wilson, 2015  
Mr. Joe Skinner, *Youth Representative*, 2015  
Ms. Kathryn Spicer, *Youth Representative*, 2015

The House of Deputies elected the lay and clergy members of the Joint Nominating Committee for the Election of the Presiding Bishop, and the House of Bishops elected the bishop members at the 77th General Convention held in Indianapolis, Indiana in 2012. The President of the House of Deputies appointed the two youth representatives.

### *\*Changes in Membership*

The Rt. Rev. Gordon Scruton was appointed by the Presiding Bishop in June 2014 to complete the term of The Rt. Rev. Thomas Shaw, who resigned for health reasons. The Rt. Rev. William Klusmeyer was appointed by the Presiding Bishop in March 2014 to complete the term of The Rt. Rev. Nathan Baxter, who resigned for health reasons.

The Committee grieved following the death of The Rt. Rev. Thomas Shaw in October 2014.

## Summary of Work

**Mandate:** The work of the JNCPB is governed by Canon 1.2. 1(e): The Joint Nominating Committee shall develop and manage a process for soliciting and identifying qualified nominees for the office of Presiding Bishop and for providing the nominees to the General Convention at which a Presiding Bishop is to be elected. The process shall include (1) providing the names of not fewer than three members of the House of Bishops for consideration by the House of Bishops and the House of Deputies in the choice of a Presiding Bishop; (2) establishing a timely process for any bishop or deputy to express the intent to nominate any other member of the House of Bishops from the floor at the time the Joint Nominating Committee presents its nominees to the joint session of the two Houses, and for each bishop so nominated to be included in the information distributed about the nominees; (3) providing pastoral care for each nominee bishop and his or her family and diocese; and (4) determining and providing for transition assistance to the Presiding Bishop and the Presiding Bishop-elect.

### Meetings

November 12-15, 2012  
Marriott St. Louis Airport, Missouri

March 18-20, 2013  
Barbara C. Harris Conference Center, New Hampshire

### *Planned Meetings of JNCPB*

January 12-14, 2015  
Maritime Institute of Technology, Maryland

March 18-22, 2015  
Lake Logan, North Carolina

April 19-21, 2015  
Dallas-Fort Worth Airport, Texas

At the first meeting in November 2012, the Committee elected officers — Ms. Sally A. Johnson and The Rt. Rev. Thomas Shaw, Co-Chairs; and the Rev. Ruth Lawson Kirk, Secretary. In the context of prayer and worship, the Committee organized by reviewing applicable Canons, Resolution A105 (GC 2012), and reports from the 2006 nominating committee. It developed a preliminary time line, set standards for communication and confidentiality, and created Communications, Profile, and Process subcommittees to begin work on its various tasks.

At the second meeting in March 2013, the Committee met with Presiding Bishop Katharine Jefferts Schori and Bishop F. Clayton Matthews to understand their views of the responsibilities and scope of work of the Presiding Bishop. The Committee formed additional subcommittees based on determined need: Budget, Education, Pastoral Care, and Transition. All subcommittees began work during the March meeting.

All of the work of the Committee from April 2013 through December 2014 was carried out via conference calls, email, and interchanges through Basecamp, a web-based collaborative work platform.

## **Communication with the Church Regarding the Office of Presiding Bishop and the Process of the Committee**

The Committee has set as a priority to communicate as often, thoroughly, and extensively about its work as is appropriate to the sensitive nature of its task. To that end, it established a Facebook page, an email address, a web page, and a Twitter account. Between November 2012 and December 2014, the Committee issued 16 press releases in order to maintain transparency about the process, to provide information, and to promote awareness.

In the months leading up to the August publication of the profile and call for nominations, the Education subcommittee composed and distributed three essays through the Episcopal Digital Network. The aim was to inform The Episcopal Church about the timeline and steps in the nominating and election process; the current roles, functions, and responsibilities of the Presiding Bishop; and to describe how the office has evolved and changed into the complex, multifaceted position it is today.

The House of Bishops received briefings and updates on the work of the Committee at its meetings in March 2013, September 2013, March 2014, and September 2014.

All communications and materials have been made available in English and Spanish. Some materials have also been made available in French.

### **Profile**

In 2013, as part of its work to develop a profile for the next Presiding Bishop, the Committee created a web-based survey to involve members of The Episcopal Church in defining the priorities for, and personal attributes of, the next Presiding Bishop. More than 5,500 responded to the survey. The results illuminated our hopes for the next Presiding Bishop as one whose life is deeply formed by scripture and prayer; and as a person of integrity, a strong communicator, and a visionary.

The survey results suggested that the most important issues the next Presiding Bishop should promote are peace and social justice within The Episcopal Church, stewardship throughout The Episcopal Church, peace and social justice in the world, and mission projects with Anglican Communion partners. According to the results, the next Presiding Bishop should focus on articulating a compelling vision for The Episcopal Church and on working to heal divisions in the Church; on presenting a clear picture of The Episcopal Church that others can understand; and on nurturing the health and vitality of our congregations and dioceses.

In addition to the survey, the Profile subcommittee conducted 17 interviews with persons who work or worked closely with the current and past Presiding Bishops, including the President of the House of Deputies, Executive Officer of the General Convention, Chief Operating Officer, and Canon to the Presiding Bishop.

The “Call to Discernment and Profile for the Election of the 27th Presiding Bishop,” was distributed in August 2014 through the Episcopal Digital Network, Facebook, and Twitter. The 20-page document attached to this report states in the summary: “We are in a time of both uncertainty and opportunity. The Church we are electing this person to lead can be characterized as follows: **Changing and Evolving:** The next Presiding Bishop will be comfortable in the midst of ambiguity and able to lead the Church in the rich, temporal space between the ‘now’ and the ‘yet to come.’ **Diverse:** We are a multinational, multilingual, multicultural, multi-ethnic, and multi-generational church. Our Presiding Bishop will delight in this diversity. **Complex:** Our polity has many components and complexities. Our Presiding Bishop will possess the requisite skills and wisdom for leading complex and democratic systems through a time of significant change.”

## Timeline and Process

The “Call to Discernment and Profile for the election of the 27th Presiding Bishop” notified the Church that any person could submit the name of any eligible bishop to the Committee by email through September 30, 2014. The Committee invited every bishop whose name was submitted to submit the initial information and to respond to initial essay questions by the end of October 2014.

In addition, in multiple communications to bishops, any bishop who felt called to be part of the Committee’s discernment process was invited to submit the requested information whether or not anyone had submitted his or her name. To allow for the submission and review of all information electronically, the Committee utilized the services of WizeHive, an online application service.

At the time of this report, the Committee has conducted video interviews with all candidates who submitted the requested information and essay responses by All Saints Day. All Committee members will be able to review the interviews as well as the written communication from each bishop candidate.

The remaining meetings in January, March, and April 2015 will allow the Committee to discern the selection of nominees, which it will announce on or around May 1, 2015. There will then follow a two-week period during which any Bishop or Deputy may indicate to the Committee an intent to nominate additional bishops from the floor at General Convention in accordance with a process that the Committee will announce.

## Transition

Canon I.2.1(e)(4) charges the Joint Nominating Committee for the Election of the Presiding Bishop with responsibility for “determining and providing for transition assistance to the Presiding Bishop and the Presiding Bishop-elect. As it undertook this work, the Committee realized that the scope of the actual work of transition from one Presiding Bishop to the next is much more extensive than is the charge for transition given to this Committee, and that no budget existed for that work. As a result, the Committee recommended to Executive Council that it establish a group responsible for the transition work not given to this Committee and also for the celebration of the new Presiding Bishop; and also that it establish a budget for that work. To that end, in June 2013 the Executive Council established a Transition and Installation Committee, and the co-chairs of this Committee were appointed members of that group.

## Budget

**Allocated Funds:        \$281,000.04**

**Expenses to date:        \$79,695.10**

\$29,448.47	November 2012 meeting
\$38,421.03	March 2013 meeting, including simultaneous translation expenses
\$5,258.00	Digital Services (WizeHive, BaseCamp subscriptions)
\$6381.20	Translation of questions, responses, forms related to nominations
\$186.40	Miscellaneous (conference calls, chair expenses related to meetings, other)

## APPENDIX: Call to Discernment and Profile for the Election of the 27th Bishop

*Presented by the Joint Nominating Committee for the Election of the Presiding Bishop, August 2014.*

### INTRODUCTION AND PURPOSE: HOW TO USE THIS DOCUMENT

As The Episcopal Church is preparing to elect its next Presiding Bishop, the Joint Nominating Committee for the Election of the Presiding Bishop (“JNCPB” or the “Committee”) offers this document to assist interested Episcopalians in understanding both the office of Presiding Bishop and the qualities the Church seeks in that person. The Executive Summary presents a broad overview. Details of the position, the desired attributes, and the canonical qualifications and requirements follow the Executive Summary.

### EXECUTIVE SUMMARY

Names of candidates for Presiding Bishop may be submitted until the end of September 2014. During October, bishops engaging in the discernment process will submit their materials. Desired qualifications have been gleaned from survey responses, personal interviews, and the collective experience and wisdom of the committee members.

Desired qualifications have been gleaned from:

- survey responses
- personal interviews
- collective wisdom of committee members

### A Presiding Bishop for Our Time

We are in a time of both uncertainty and opportunity. The Church we are electing this person to lead can be characterized as follows:

**Changing and Evolving:** The next Presiding Bishop will be comfortable in the midst of ambiguity and able to lead the Church in the rich, temporal space between the “now” and the “yet to come.”

**Diverse:** We are a multi-national, multi-lingual, multi-cultural, multi-ethnic, and multi-generational Church. Our Presiding Bishop will delight in this diversity.

**Complex:** Our polity has many components and complexities. Our Presiding Bishop will possess the requisite skills and wisdom for leading complex and democratic systems through a time of significant change.

### Personal and Professional Attributes

Our next Presiding Bishop will possess the following attributes or demonstrate strength in the areas of personal and professional gifts and practices:

- An authentic spiritual life deeply grounded in prayer
- An evangelist’s heart, proclaiming the Gospel of Jesus Christ through preaching and teaching
- Love of the people, with vibrant relational skills
- Personal health and self-awareness
- Collaborative leadership skills
- Knowledge of, and experience in, The Episcopal Church
- Ability to nurture dioceses and congregations in their development
- Ability to inspire growth and lead through change
- Ability to balance roles and responsibilities in complex governance structures

## Canonical Qualifications, Term, and Roles of Presiding Bishop

The Constitution and Canons of the Episcopal Church define a number of requirements, roles, and duties of the Presiding Bishop.

**Canonical Qualifications:** The Presiding Bishop must be a member of the House of Bishops of The Episcopal Church.

**Term:** The term is nine years, beginning on November 1, 2015, and ending on October 31, 2024. If the Presiding Bishop reaches age 72 prior to completion of the term, the Presiding Bishop must resign to the General Convention closest to the date on which he or she becomes 72.

**Roles:** The Presiding Bishop speaks for the Church on policies and programs of General Convention, speaks God's word to the Church and world, represents the Church to the Anglican Communion, serves as Chief Consecrator, and presides over the House of Bishops. The Presiding Bishop also has responsibilities for a wide variety of other ministries and jurisdictions. Other responsibilities include a significant role in various aspects of the discipline and changes in status of bishops.

**Governance Functions:** In the governance of the Church, the Presiding Bishop has a variety of responsibilities in appointments to various governing bodies: making decisions with the President of the House of Deputies; serving as a member of every committee and commission of the Church; and serving as Chair and President of the key governing boards of the Church.

**Executive Functions:** The Presiding Bishop is Chief Executive Officer of the Executive Council and therefore responsible for staff and operations of the Church Center, with the exception of the executive office of the General Convention.

**Other Roles:** The Presiding Bishop speaks and preaches at a wide variety of functions, provides hospitality on behalf of the Church to visiting leaders, serves as leader of organizations associated with the Church, along with other duties not required by the Canons.

## Summary Conclusion

This brief Summary is now followed by a more comprehensive presentation of the Profile. God bless each one of you and God bless our Church as we move forward in this process.

**To submit the name of a bishop of The Episcopal Church for consideration by the JNCPB, please send an email to [pbnominatingcommittee@gmail.com](mailto:pbnominatingcommittee@gmail.com).** The Committee will contact all bishops whose names are submitted to invite them to participate in our discernment process. The deadline for submitting names is September 30, 2014.

## Invitation

Between now and September 30, 2014, any member of The Episcopal Church may submit the name of a bishop to the Joint Nominating Committee for the Election of the Presiding Bishop (JNCPB) whom they believe to be qualified and called to serve as the 27<sup>th</sup> Presiding Bishop. The JNCPB will inform bishops whose names have been presented and advise them that if they wish to engage the discernment process, they must submit materials as specified in the Profile between October 1 and October 31. This Profile is intended to assist with prayerful discernment, both for those people considering proposing candidates, and for Bishops considering their possible call to minister to the Church as its Presiding Bishop.

In this Call to Discernment and Profile (“Call to Discernment”) the JNCPB hopes to familiarize Deputies to General Convention and Bishops, as well as members of the Church at large, with the role and responsibilities of the Presiding Bishop and the characteristics that will equip the next Presiding Bishop to inspire and lead The Episcopal Church into the future. The Church chooses a Presiding Bishop to serve the needs of the Church and the world at a given moment in history. Thus, this Call to Discernment will offer some comments on the nature of the Church and time to which our next Presiding Bishop will be elected.

The Call to Discernment is reflective and inclusive of comments and ideas from over 5400 survey responses in addition to extensive interviews with past and present Presiding Bishops, General Convention Executive Officers, Canons to the Presiding Bishop, Chief Operating Officers and Presidents of the House of Deputies. The JNCPB made every effort to be as expansive and inclusive as possible in listening to the wider Church and its hope for our next Presiding Bishop. The Call to Discernment also reflects the Committee’s discernment about the needs of the Church for the next decade and the skills, gifts and characteristics that will enable the Presiding Bishop to carry out effectively his or her roles and responsibilities.

The members of the JNCPB offer this Call to Discernment with hope and anticipation for our future Church. The JNCPB will continue to pray for those in our Church in active discernment and ask, in turn, for the continued prayers of our Church as we together discern the call of our next Presiding Bishop. May God’s peace be always with our beloved Church and with the people who, through the power of the Holy Spirit, breathe life and vitality into its being.

#### **A PRESIDING BISHOP FOR OUR TIME**

Our next Presiding Bishop will be called to serve God and the Church in a specific moment in history. In the past few years, the pace of change has greatly accelerated and the Church finds itself navigating dramatically shifting sands in what it means to be faithful disciples of Jesus Christ in the 21<sup>st</sup> century. The Presiding Bishop will need to lead, love, and inspire the people at a time in which both uncertainty and opportunity define the moment.

**Changing and Evolving:** The winds of change are blowing throughout The Episcopal Church. Church-going Boomers continue to populate our pews, and the Millennials’ “spiritual-not-religious” interests have pushed the Church to claim its relevance. Concern about declining or shifting membership, changing attitudes toward organizational structure, declining resources for existing church-wide structures, travel and staff, rapidly changing needs and methods for communication, and questions of inclusion are but some of the contributing factors to the era of change.

While anxiety, resistance, and fear are natural and predictable human responses to change, it is also true that uncertainty inspires adaptation and innovation — and throughout The Episcopal Church, communities of faith are responding to change with creative ingenuity. The next Presiding Bishop will need to be comfortable in the midst of ambiguity and able to lead the Church effectively in the rich, temporal space between the “now” and the “yet to come.” Effective leadership will manifest in the Presiding Bishop’s capacity to narrate for the people the presence of the Gospel in the midst of change, in raising up for the Church where hope is proclaimed and lived out, and in assuming the primary work of articulating our Church’s theological and spiritual identity as it moves into the future.

Finally, effective episcopal leadership will seek to open spaces for our collective learning, where stories of health and vitality and mission from across the Church can be told, and from which an articulate, public vision for the emerging Christian life can be shared.

**Diverse:** The Episcopal Church at this present moment stretches nearly around the globe with congregations in Europe, the Caribbean, Central America, South America, and Asia as well as covering the United States and

its territories. We are multi-national, multi-lingual, multi-cultural, multi-ethnic, and multi-generational. We seek to reach and serve people who have very different views and experiences of organizations and structures. We intend to adapt and grow in order to empower the ministries and witness of young people. The Church will be well served by a Presiding Bishop who delights, by both word and deed, in the diversity of our Church.

**Complex:** The Episcopal Church is a complex organism with multiple levels of organization and structure, over which General Convention is the final legislative authority. The Church is governed and decisions are made at every level through democratic processes in which all the ministers of the Church (lay persons, bishops, priests and deacons) participate. Leadership and responsibility are dispersed to the Presiding Bishop, President of the House of Deputies, House of Bishops, House of Deputies, Executive Officer of the General Convention and various, committees, commissions, agencies and boards (CCABs). A Presiding Bishop for our time will need experience and wisdom in leading vast, complex, and democratic systems through significant change.

### **Personal and Professional Attributes**

Given the challenges and opportunities of the Church in the upcoming years, our next Presiding Bishop will need demonstrated strength in the following areas of personal and professional gifts:

**An authentic spiritual life deeply grounded in prayer:** The Church seeks a Presiding Bishop with a generosity of spirit, whose life is formed deeply by the core values of scripture, tradition and reason. We seek a person whose life in prayer equips him or her to proclaim articulately and passionately the Gospel of Jesus Christ both to the Church and the world. The person's spiritual practice should be palpable, and visibly inform his or her leadership style, decision making, preaching, and writing. We also seek a Presiding Bishop whose professed Christian values (for example, solidarity with the poor and marginalized) align with his or her personal engagement and action in the world.

**A preacher and teacher for the people:** The Church is asking for a Presiding Bishop who is an illustrative and excellent communicator, intellectually agile, theologically sophisticated, and able to preach and teach for personal transformation. We want a Presiding Bishop to share God's mission, particularly to proclaim the Good News of the Gospel and to reach out creatively to serve the world in Christ's name. Our hope is for an excellent preacher and teacher who is versatile, and someone who thrives in a variety of ministerial situations, both large and small gatherings as well as one-to-one.

**Pastoral and relational engagement:** The next Presiding Bishop should have a genuine love of the people with special gifts as a unifier, peacemaker, and reconciler. We seek a compassionate person able to minister to those with a wide variety of viewpoints and perspectives and across generations and cultures, with a particular pastoral sensitivity to minority voices. A Presiding Bishop will be served by a desire and capacity to build meaningful and trusting community with elected and appointed leaders across the Church as well as with Church Center staff leadership.

We recognize that no one person can — or should — try to do and be all things for the Church. And, conversely, the Church should not expect a Presiding Bishop to do and be all things. A Presiding Bishop is well served if he or she is self-reflective, bringing to the office a strong sense of self, specifically an acute self awareness that will equip him or her to make good use of personal strengths and provision for weaknesses. Our next Presiding Bishop should have a well-honed sense of humor and deep humility, in addition to the capacity to make space for personal well-being and nurture as the ministry of the Presiding Bishop requires physical, psychological, and emotional stamina and health.



**Collaborative leadership skills:** The next Presiding Bishop will be well served by a collaborative leadership style with expertise and wisdom in group dynamics, consensus building, conflict management and resolution, and reflective evaluation. The candidate should have a track record of collegial and collaborative cooperation across all the ministers of the Church (lay persons, bishops, priests, and deacons), and be able to delegate tasks and responsibilities to senior staff. Experience with team building is desired, with demonstrated capacity for transparency and an open and clear communication style.

**Knowledge of, and experience in, The Episcopal Church and the Anglican Communion:** A deep appreciation and integral understanding of The Episcopal Church’s history and polity is needed as well as a respect and love for the distributive, shared authority of leadership across the Church including the scope and limitations of the authority of each position and body of the Church. The Presiding Bishop will work collaboratively with others in the Anglican Communion, preaching the Gospel and engaging God in God’s mission. A Presiding Bishop for our time will be able to articulate passionately The Episcopal Church’s justice foundations, delight in the cross cultural reality of our Church, and have extensive experience successfully operating and leading complex organizational structures.

**Programmatic focus and leadership:** We seek a Presiding Bishop who knows how to nurture the health and vitality of our congregations and dioceses; articulates a compelling and inspiring vision for the Church’s evangelism and growth; and presents a vivid and hopeful picture of The Episcopal Church to the world. It is critical that the next Presiding Bishop enter the office with a passion for helping to lead the restructuring of the Church and advancement of stewardship throughout the Church as well as maintain a continued focus on domestic and international mission. We seek a skilled and relational fund-raiser for the life and vitality of our Church. Finally, we seek an effective and loving leader of the House of Bishops.

**Balance of Roles and Responsibilities:** We seek a Presiding Bishop who understands, appreciates and works diligently to balance the various roles and responsibilities of the office and who has a primary focus on the canonical roles of governance, administration and leadership within The Episcopal Church.

### **Canonical Qualifications, Term, and Roles of Presiding Bishop**

**Canonical Qualifications:** The Episcopal Church’s Constitution and Canons do not set any limitations or requirements on which Bishops of the Church may serve as Presiding Bishop. Any Bishop of The Episcopal Church on the day nominations are received in a Joint Session of the House of Deputies and House of Bishops at General Convention is eligible, subject to being nominated in accordance with the Canons and processes prescribed by the JNCPB. However, consideration must be given to the canonical provisions on the term described below.

**Term:** The Presiding Bishop’s term is nine years beginning November 1, 2015 and concluding October 31, 2024 unless the Presiding Bishop reaches the age of 72 prior to the completion of the term, in which case he or she must resign to the General Convention closest to the date on which he or she turns 72. In that event, a new Presiding Bishop would be elected at that General Convention for a term of nine years beginning November 1 following the close of General Convention.

**Roles:** The primary source for understanding the role and responsibilities of Presiding Bishop is the Church’s Constitution and Canons.

### **Presiding Bishop Functions**

The Church is most familiar with the Presiding Bishop’s roles to:

- Speak for the Church on the policies, strategies, and programs of General Convention
- Speak God’s words to the Church and to the world as the representative of this Church

- Represent The Episcopal Church in the Anglican Communion as Primate
- Serve as Chief Consecrator at the ordination and consecration of Bishops
- Preside over the House of Bishops

In addition the Presiding Bishop has responsibilities for:

- Congregations in foreign lands
- The consent process upon the election of bishops
- Members of religious orders and Christian communities
- The Convocation of American Churches in Europe
- The Episcopal Church in Micronesia
- The Episcopal Church in Navajoland
- Federal chaplaincies and the Bishop for Federal Ministries
- Dioceses without bishops

The Presiding Bishop also has significant responsibilities for the discipline and changes in status of bishops:

- Receives renunciations of bishops
- Receives resignations of bishops
- Receives evidence of the incapacity of bishops
- Issues pastoral directions, restrictions on ministry and administrative leaves to bishops
- Appoints the Intake Officer for complaints against bishops
- Serves on the Reference Panel of the Disciplinary Board for bishops
- Certifies abandonment of communion by bishops
- Processes charges of violations of doctrine by bishops
- Has a significant role in proceedings to terminate the relationship of a bishop and a diocese

*The Presiding Bishop will need to lead, love, and inspire the people at a time in which both uncertainty and opportunity define the moment.*

### **Governance Functions**

**Appointments:** The Presiding Bishop appoints bishops to all the Standing Commissions, Joint Standing Committees, Task Forces of General Convention, Committees of the House of Bishops, legislative committees of the House of Bishops at General Convention, Board of Transition Ministries, and Board of Archives. He or she makes other appointments to the General Board of Examining Chaplains, United Thank Offering Board, appoints personal representatives to Standing Commissions, and, in the event of a vacancy, appoints the Registrar.

**Joint Decision Making with President of the House of Deputies:** The Presiding Bishop and President of the House of Deputies jointly appoint the Executive Council committees, Executive Council members to serve as liaisons to each Standing Commission, the Chief Financial Officer of Executive Council, the Executive Officer of General Convention, and the Treasurer of General Convention in the event of a vacancy. They may jointly change the date and length of General Convention, appoint and may designate the House of initial action for every resolution before General Convention.

**Member of Committees and Commissions:** The Presiding Bishop is a member of every Standing Commission, Joint Standing Committee (Program, Budget & Finance; Planning and Arrangements; Nominations) and other Committees and governance bodies.

**Chair and President of Governing Boards:** The Presiding Bishop serves as the President of the Domestic and Foreign Missionary Society (DFMS), the New York nonprofit corporate entity through which The Episcopal

Church owns property and does business. The Executive Council is the Board of Directors of this corporation. The Presiding Bishop is also Chair and President of the Executive Council and as such has “ultimate responsibility for the oversight of the work of the Executive Council in the implementation of the ministry and mission of the Church as may be committed to the Executive Council by General Convention.” (Canon I. 4.3(a))

### **Executive Functions**

**Chief Executive Officer of Executive Council:** As the CEO of Executive Council the Presiding Bishop is responsible for the day-to-day functioning of the staff of Executive Council and the operations of the Church Center in New York and other offices of the Church. This means the Presiding Bishop has responsibility for the finances, management of real estate, staff and programs for most functions at the church-wide level with the major exceptions being the staff and operations of the Executive Office of the General Convention and the office and staff of the President of the House of Deputies.

**Other Executive Functions:** In addition to the staff of Executive Council, the Presiding Bishop is responsible for the staff and activities in his or her office, which typically include at a minimum a Canon to the Presiding Bishop and the Bishop in charge of the Office of Pastoral Development.

### **Other Roles**

Some roles of the Presiding Bishop are not specified in the Constitution and Canons but naturally result from them. Still other roles are given to the Presiding Bishop by other organizations.

**Speaker & Preacher:** The Presiding Bishop is a sought-after speaker and preacher by innumerable organizations and groups in the Church and Communion.

**Provide Hospitality:** On behalf of the whole church, the Presiding Bishop offers hospitality to visiting Church leaders, members of the Anglican Communion, and ecumenical and interfaith visitors.

**Leader of Related Organizations:** The Presiding Bishop has leadership roles with several other organizations closely related to The Episcopal Church, including appointing and/or serving on the governing boards of General Seminary, Episcopal Relief and Development, and the College for Bishops.

### **CONCLUSION**

This profile ends where it began: with an invitation. The JNCPB hopes that this Call to Discernment and Profile will serve as an effective tool for the members of our beloved Church to discern candidates for our next Presiding Bishop. We invite your prayerful consideration and participation.

**To submit the name of a bishop of The Episcopal Church for consideration by the JNCPB, please send an email to [pbnominatingcommittee@gmail.com](mailto:pbnominatingcommittee@gmail.com).** The Committee will contact all bishops whose names are submitted to invite them to participate in our discernment process. The deadline for submitting names is September 30, 2014.

# JOINT STANDING COMMITTEE ON NOMINATIONS

## Membership

The Rev. Canon Lee Alison Crawford, *Chair*, 2015  
The Rt. Rev. Edward Little, *Vice Chair*, 2015  
Canon Richard Miller, *Secretary*, 2015  
The Rev. Valerie Balling\*  
Ms. Hisako Beasley, 2015  
Mrs. Sherry Denton, 2015  
Ms. Janice Dunlap\*  
The Rev. Rosali Fernández-Pola\*  
Mr. Christopher Hart\*  
The Rt. Rev. Chilton Knudsen, 2015  
The Rev. Ledlie Laughlin, 2015  
Mr. Gibson Oakley\*  
Mrs. Margaret Schaefer\*  
The Rt. Rev. Chester Talton, 2015  
Mr. Jack Tull\*  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. Canon David Pfaff, *Consultant\**

### *Changes in Membership*

During the triennium, there were four changes in membership: The Rev. Rosali Fernández-Pola resigned in November 2012; Mr. Jack Tull was appointed to fill his place in November 2012; Mr. Gibson Oakley, The Rev. Canon David Pfaff, and Mrs. Margaret Schaefer resigned in April 2014. The Rev. Canon David Pfaff was appointed Consultant to the Committee. Ms. Janice Dunlap, Mr. Christopher Hart and The Rev. Valerie Balling were appointed to fill vacancies in April 2014.

### *Representation at General Convention*

Bishop Edward Little and Deputy Lee Alison Crawford are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To submit nominations for the election of: (a) Trustees of The Church Pension Fund, serving as the Joint Committee referred to in Canon I.8.2.; (b) Members of the Executive Council under Canon I.4.1(c); (c) the Secretary of the House of Deputies and the Treasurer of the General Convention under Canon I.1.1(j); (d) Trustees of the General Theological Seminary; (e) General Board of Examining Chaplains.

**Meetings:** The Joint Standing Committee on Nominations accomplished its work in five teleconference/Adobe Connect calls and one face-to-face meeting. The meetings of November 6, 2012; April 5, 2013; December 13, 2013; May 2, 2014; and November 3, 2014 were conducted by telephone or Adobe Connect. The one face-to-face meeting took place at the Crowne Plaza Hotel and Conference Center–Chicago O’Hare, June 11-14, 2014. Electronic communications on the GCO Extranet system assisted the Committee throughout the triennium.

During the first conference call, the Committee appointed Canon Richard Miller as Secretary and The Rev. Canon David Pfaff as Chaplain. The Committee discussed its budget and agreed to ask Executive Council for \$25,000 for the triennium. The Committee established four subcommittees for its work: 1) Church Pension

Fund; 2) Executive Council; 3) Secretary of the House of Deputies and Secretary of the General Convention, Treasurer of General Convention; and 4) General Board of Examining Chaplains, the General Theological Seminary, and the Disciplinary Board of Bishops. Each committee was tasked with creating a job description for each position.

Committee members affirmed the need for face-to-face meetings with the Executive Officer of General Convention, who, in the past has also been the Secretary of General Convention; and the Treasurer of General Convention, who, in the past has also been Treasurer and Chief Financial Officer of The Episcopal Church and the President of the Church Pension Group.

Between the January 2013 meeting and the subsequent one, the chair spoke with Duncan Ely (GBEC) and The Rev. Dr. Canon Michael Barlowe (Executive Officer of General Convention). The JOINT RULES VII Sec. 18 reads, "Except for the Secretary and the Treasurer of the General Convention, the said Committee is instructed to nominate a number, equal to at least twice the number of vacancies ... ." With this in mind, committee member Mr. Jack Tull contacted The Rev. Dr. Canon Michael Barlowe and Mr. N. Kurt Barnes on April 18, 2013 to see if they intended to be nominees for Secretary of the House of Deputies and Treasurer of the General Convention, respectively. They both affirmed that they intended to be nominees.

The Committee met again by conference call in April 2013. The chair notified the Committee that the \$25,000 committee budget request for the 2013-2015 triennium was reduced to \$16,000 by the Executive Council of The Episcopal Church. The Committee appointed conveners for each subcommittee and discussed steps forward with limited resources.

In between this call and the following call in June 2013, each subcommittee contacted the appropriate leaders of the church entities covered by their subcommittee to find out knowledge, skills, abilities, and other desirable qualities that nominees should possess. Jack Tull requested and received the position descriptions for the Secretary of the House of Deputies and Secretary of the General Convention and for the Treasurer of the General Convention from Mr. Christopher Barajas, Manager for Digital Systems & Publications, General Convention Office. Mr. Barajas said that these position descriptions were created by the Joint Standing Committee on Nominations in the last triennium. In the position description for the Secretary of the House of Deputies, a duty said, "Receive Testimonials of election of bishops within 120 days of General Convention," which the Committee removed. Mr. Barajas confirmed that that portion of the Canons dealing with consents for Bishop-elects was eliminated by the 77th General Convention.

The subcommittees then drafted a description of these attributes for potential nominees. These results and descriptions were shared with the entire Committee before the June 2013 conference call. Subcommittees posted the document to the extranet for the entire Committee to review.

In September 2013, the CPG subgroup travelled to New York City and met with CEO Mary Kate Wold and the Board. Prior to the meeting, they spoke with the Trustee officers The Rt. Revs. Wayne Wright (Chair) and Robert Johnson (Vice Chair); and with Vice Chair Barbara Creed.

Between the June and December calls, work continued on refining position descriptions. As it was the Committee's first time working with Adobe Connect, Mr. Brian Murray, of the General Convention Office, assisted the Committee. The Committee refined all position descriptions and, in light of the work of the Task Force on Reimagining the Church, included a new question for candidates: "In a bulleted list, please describe up to five experiences you have had in the Church or the world that have helped prepare you for serving in this position. Of particular interest are experiences in moments of transition and change and how you responded to them." The Committee also recognized the absolute necessity for candidates to have knowledge and skill in using the internet for the work of a CCAB.

Members posted final revisions to the position descriptions after this meeting. During January, the Chair translated all position descriptions, application forms, and letter of invitation from English into French and Spanish. All documents went live on the JSCN web page in early February. The application deadline was March 15, 2014. As the number of candidates fell short of the requisite amount for some, but not all, of the groups, the Committee then extended the deadline to April 1, 2014. The most difficult board for which to fill slots was the General Board of Examining Chaplains.

Between April and the June meeting, each subcommittee was tasked with calling references provided by the applicants. Each candidate's references were contacted by a clergy/lay pair of committee members. While the chair and vice chair had access to every single candidate's application, only those applications of candidates applying for a particular position were distributed to the subcommittee members tasked with finding appropriate candidates for that office.

The Committee had its one and only face-to-face meeting June 11-14, 2014 at the Plaza Hotel and Conference Center—Chicago O'Hare. During this three-day meeting, the Committee engaged in anti-racism training, which was provided by Crossroads Anti-Racism Organization and Training and the Antiracism Commission of the Episcopal Diocese of Chicago. Trainers were Karen Zeich, Derrick Dawson, and Gary Cox, with Michelle Alexander, intern.

Each committee member was asked to talk about his or her role in the Church, and about their impressions regarding the need for, and importance of, anti-racism training. A discussion of power and how it relates to the work of the JSCN was pursued after training ended. The Committee agreed as a whole that the Crossroads Anti-Racism Organization gave them some new language and concepts that they hitherto had not articulated, either as individuals or as a committee. Members also agreed that the work of the Committee would have been enhanced had this important discussion taken place early on in the triennium – even before refining job position descriptions, soliciting applications, and making reference calls.

Next, the Committee held an extensive conversation via conference call about possible changes to the composition of GBEC membership with The Rt. Rev. Larry Benfield, Bishop of Arkansas, vice chair of GBEC, and current board member; and with Duncan Ely, executive director of GBEC. Two major points concerned the work of the Committee at this juncture:

- 1) How the proposed changes and the variables involved might be approached at General Convention (GC). It is not certain if timing of the canonical changes would take effect at GC or post-convention. In the interim, the JSCN must act under the current canon.
- 2) How the proposed changes make the Board operate more in line with commissions where appointment of bishops is made by the House of Bishops, the Presiding Bishop, and nominees provided by the existing board. In light of the proposed changes, the GBEC wanted to be proactive in assisting the JSCN in our current process.

The Committee met in subgroups to report on the reference calls they had made and to answer any questions that other subcommittee members had about those candidates whose references they had not called. Each subcommittee then decided whom to advance and whom not to advance, and prepared their slate for the entire JSCN.

In plenary session, the Committee reviewed the nominees submitted for the positions available for election and discussed the further need for candidates. Subsequently, the plenary session recessed to meet in subcommittees to review further and discuss candidates for elected offices. When the Committee reconvened, it voted to approve the slates of candidates the subcommittees prepared.

Having accomplished this task, the Committee broke into three discussion groups for the remainder of the last morning session in order to craft a resolution for GBEC, to create a proposed policy on campaigning or politicking during Convention, and to create a statement/press release on this meeting.

By meeting's end, committee members had divided up the work needed to prepare the Blue Book report: assembling all biographies and photographs of each candidate; preparing a statistical analysis; contacting the Executive Officer of General Convention about the Committee's concerns about politicking at GC; and redacting the actual report.

The Committee held its last meeting via Adobe Connect on November 3, 2014. During this call, the Committee reviewed, edited, and approved the present report; heard any updates on candidate changes or additions since June; and signed off on the slate.

NOMINEE STATISTICS

<b>Total Nominees</b>		79	
<b>Gender</b>	Male	32	40.5%
	Female	47	59.5%
<b>Ethnicity</b>	Asian	5	6.3%
	Black	10	12.7%
	Latino/a	10	12.7%
	Native	2	2.5%
	Caucasian	47	59.5%
	unknown	5	6.3%
<b>Age Distribution</b>	30-39	6	7.6%
	40-49	9	11.4%
	50-59	22	27.8%
	60-69	30	38.0%
	70+	7	8.9%
	unknown	5	6.3%

Nominees by Province

	CPF	EC	GBEC	GTS	GC	Total
<b>Province I</b>	2	2	2	1	1	8
<b>Province II</b>	2	3		3	1	9
<b>Province III</b>	3	2	3			8
<b>Province IV</b>	7	7	4	2		20
<b>Province V</b>	2	1	1	2		6
<b>Province VI</b>	3	1	1			5
<b>Province VII</b>	2	1	1	1		5
<b>Province VIII</b>	4	5	2	2	1	14
<b>Province IX</b>	1	3				4
<b>Total</b>	26	25	14	11	3	79
<b>Anti-Racism-Trained</b>	23	21	9	10	3	66
<b>Average Age</b>	60.7	53	54.7	61.3	67	



The preponderance of nominees continues to be Caucasians over age 55, with more men than women being put forward as candidates. Province IV, followed by Province VII, provided the greatest number of nominees, perhaps reflecting a concentration of Episcopalians in those regions. Province IX had the least number of nominees, attributed in part to communication issues. Nominees for General Convention deputies tend to be older than those for other offices; work obligations may well dictate who can run for deputy. This might affect who receives the call for nominations for CCABs and who responds to the invitation. The current General Convention calendar tends to invite candidates who have retired to stand for election. The Committee also noted that no deacons presented themselves. This fact reflects the varying interpretations of the role of deacons in the councils of the Church.

### **Recommendations**

In the course of the triennium, the Committee discussed at length two concerns: the budget cuts that affected its ability to work, and campaigning at General Convention.

First, the budget cuts that reduced the funding from \$25,000 to \$16,000 for the triennium: the Committee was not invited to participate in the initial November 2012 gathering of Committees, Commissions, Agencies, and Boards (CCABs). Committee members felt that the loss of that early face-to-face meeting and – more important – the anti-racism training that took place there, hampered their ability to work efficiently earlier on in the triennium and to understand the power dynamics inherent in recruiting candidates. The Committee strongly recommends that the JSCN be included in the initial gathering of CCABs. This will require additional funds for its budget.

Second, campaigning at General Convention: the Committee believes that excessive campaigning at General Convention negatively affects the voting process. Moreover, politicking is contrary to the Spirit of the Church and discernment. Effective politicking does not reflect an individual's gifts or abilities to carry out the ministry to which they may be elected. Deputies and Bishops must walk through a gauntlet of candidates' supporters handing out papers, brochures, and knick-knacks. Those running for Executive Council and the Church Pension Group tend to campaign more than those running for other offices, such as the General Board of Examining Chaplains, or Trustee for the General Theological Seminary. Committee members think that such campaigning places some individuals at a disadvantage.

The Committee affirms the importance of a well-informed electorate, and the desire of candidates to be well-known. Therefore, in place of politicking, it proposes that the office and staff of the General Convention create a website at which all candidates may post the following:

- Photograph
- Narrative information, not to exceed 1000 words, as an addition to the 150-word statement in the Blue Book
- Video not to exceed two minutes
- Link to additional information

The intent of these changes is to:

- Ensure that elections to the councils of the Church are inclusive and accessible
- Affirm that elections to the councils of the Church are centered in discernment for ministry
- Avoid printing and wasting of paper

The Committee therefore strongly suggests that no candidate shall politick by standing at doors to the convention hall distributing leaflets, tchotchkes, etc.; or by hosting special gatherings. If needed, perhaps Planning and Arrangements could create one area between that of the House of Bishops and the House of Deputies where all candidates' materials may be placed and displayed appropriately.

The Committee also recommends the following changes to a candidate's application: remove the 'Optional' label from the Ethnicity box. Label instead as, "Please complete." Add the question: "Please tell us how exercising this ministry and serving in this capacity would be an expression of your faith and understanding of how to follow Jesus?"

Finally, the Committee recognizes the need to be more pro-active in soliciting applications from different groups, especially those dioceses of Province IX. Committee members should contact expressly groups such as the Union of Black Episcopalians, the Episcopal Women's Caucus, the National Association of Deacons, Integrity, the Latino ministry network, and various online networks.

The Committee is pleased to place in nomination for balloting at the 78th General Convention the names following this report.

**PROPOSED RESOLUTIONS**

The Joint Standing Committee on Nominations endorses the proposed resolution 2015-A041 of the General Board of Examining Chaplains to Amend Canon III.15.1-5 concerning the Board's composition and functions.

**Budget**

The Joint Standing Committee on Nominations was budgeted \$16,000 for the 2013-2015 triennium. At the time of this report, the Committee spent \$0.00 and \$15,323.75 in 2014, totaling \$15,323.75.

The Joint Standing Committee on Nominations will require \$30,000 for meetings and other expenses for the 2016-2018 triennium. The Joint Standing Committee on Nominations plans to meet approximately two times during the next triennium, in attending the initial meeting of CCABs, and then a meeting in the second year of the triennium (2017). This will require \$15,000 for 2016; \$15,000 for 2017; and none for 2018, for a total of \$30,000 for the triennium.

## NOMINEES FOR ELECTION

The Episcopal Church elects its leaders. This is a distinctive and traditional feature of our common life, and a vital function of the General Convention. The Committee asked nominees to respond to the following statement:

*Please share your competencies and skills that are relevant to serving in this position, and indicate how you hope to use these gifts if elected.*

The answers from the following nominees reflect their answer to the question and their biographical information.

### Executive Office of the General Convention

#### SECRETARY OF THE HOUSE OF DEPUTIES

This is a three-year term. The House of Deputies elects the Secretary of the House of Deputies; by concurrence of the House of Bishops, the Secretary of the House of Deputies also becomes the Secretary of the General Convention.

#### **The Rev. Canon Dr. Michael Barlowe**

New York, NY  
Grace Cathedral, San Francisco  
Diocese of California, Province VIII



I joined The Episcopal Church when I was a young adult, and I found a community living to transform the world. Ever since, I have been passionate about our Church, working to strengthen and enlarge her life and service among God's people. I believe The Episcopal Church has a mission that deserves our highest aspirations, greatest creativity, and broadest proclamation of the Good News of Jesus Christ. Ministries as an inner-city rector, cathedral dean, diocesan executive, and Executive Officer of General Convention have given me practical wisdom for the work of Secretary of the House of Deputies. As deputy or alternate from three dioceses, as a member of Executive Council, and through policy work in domestic and world mission, I have gained insight into the complexities of our Church's ministry. It would be an honor to serve the church as Secretary as we grow in mission, spiritual vitality, and service.

#### TREASURER OF THE GENERAL CONVENTION

This is a three-year term. The House of Deputies elects this position; the House of Bishops confirms this election.

#### **Mr. N. Kurt Barnes**

New York, NY  
Grace Church  
Diocese of New York, Province II



Since 2003, I have served as treasurer and CFO of The Episcopal Church and as treasurer of General Convention, continuing a career that spans finance and investment in for-profit and not-for-profit organizations. I have worked as a RAND Corporation economist; as a Time Inc. corporate planner; as an editor of Fortune Magazine; as an Inco Limited finance officer; and with Morgan Stanley Asset Management. Through the New York State Attorney General, I was appointed CFO of Hale House to

correct financial mismanagement. I assisted Amnesty International in restructuring its financial management and investment committee. I have a passion for efficiency and effectiveness in carrying out God's mission, which means recognizing the fiduciary responsibility to work collaboratively for the entire Church, without favoring individual groups, and while avoiding duplication of activities. I hope that with patience and the ability to explain complicated subjects simply, I can continue to serve the Church in multiple roles.

**Mr. Delbert C. Glover**

Providence, Rhode Island  
 Church of the Redeemer  
 Diocese of Rhode Island, Province I



As a retired DuPont vice president and active Church leader on diocesan and national levels, I would bring experience in finances and my professional, leadership, and interpersonal skills to this position. I have served as the chief administrative executive officer at Trinity Church, Wall Street and The Riverside Church and was the Associate Dean at General Theological Seminary. In both my secular and church roles, I was involved in developing and managing multimillion-dollar budgets. I have been a General Convention deputy six times; and a member of the Executive Council, where I was the chair of the Finance Committee and a member of the Audit Committee. I've also been a board member of the National Cathedral and currently serve on the Church Pension Fund board. I am a candidate for treasurer to serve my Church, to help oversee its financial affairs and faithfully administer the budget adopted by General Convention.

## Trustees of the Church Pension Fund

**Position Description**

The Trustees of the Church Pension Fund (CPF) play a critical role in the governance and oversight of the Church Pension Group (CPG), including the Church Pension Fund and the following affiliates:

- The Episcopal Church Medical Trust
- Church Life Insurance Corporation
- The Church Insurance Companies (which include The Church Insurance Agency Corporation, The Church Insurance Company, The Church Insurance Company of New York, and The Church Insurance Company of Vermont)
- Church Publishing Incorporated

Trustees make significant decisions affecting investment strategy, pension policy and benefits, and other CPG services. This requires them to address complex issues faced by the Church Pension Fund and its affiliated companies, while recognizing the need for compassion and flexibility, ensuring fiscal accountability, and balancing social and fiduciary responsibilities.

CPF Trustees may serve on one or more board committees as well as on the boards of CPG's affiliated companies.

Additional information on the Church Pension Fund can be found in the Constitution & Canons, Canon I.8, and in the report of the Church Pension Fund to the General Convention.

**Competencies & Qualities**

CPF needs trustees who have expertise and experience in areas of business similar to CPG's principal businesses (e.g., investments, pensions, employee benefits, insurance, and health care) and relevant skills (e.g., accountants, attorneys, and other business and financial professionals), in addition to experience with the Church. It is vital that incumbents have computer literacy and internet access. In addition, CPF and its trustees value diversity (broadly defined) on the Board of Trustees.

**Time Expectations**

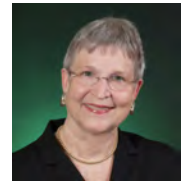
Meetings of the CPF Board are usually scheduled in conjunction with committee and affiliate board meetings, which together require a commitment of three days in New York City, four times per year. In addition, there is an annual 3-4-day offsite meeting. In advance of each face-to-face meeting, trustees may participate in committee conference calls and may review reports, financial statements, and other materials prepared by, or at the request of, CPG management.

**Trustee Nominees**

There are twelve (12) available positions, for six-year terms. The House of Deputies elects the Trustees; the House of Bishops confirms the election.

**Ms. Martha Bedell Alexander**

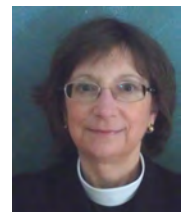
Charlotte, NC  
 Christ Church  
 Diocese of North Carolina, Province IV



Over the years, I've served the Church on local, diocesan, provincial, and national levels. I'm president of the Standing Committee in the Diocese of North Carolina, am on the Botswana-North Carolina Companion Link Committee, and am involved with the Companion Diocese Network in Province IV. I have been a General Convention deputy since 2003, and delegate or alternate to North Carolina's Diocesan Convention since 1975. I was chair and secretary of the Standing Commission on World Mission (2003-2009). In the world beyond the Church, I served as an elected official for 20 years and as executive director of a not-for-profit agency. I've been a Church Pension Fund trustee since 2009 and bring to that role a commitment to serving our clergy and lay employee beneficiaries, an understanding and working knowledge of The Episcopal Church, and an appreciation for budgets and fiscal responsibilities. I would be honored to continue my service on the CPF Board.

**The Rev. Theresa Markley Brion**

Cumberland, MD  
 Diocese of Maryland, Province III



I am a former ERISA/employee benefits attorney who practiced with regional and international law firms for seven years before becoming a tax and employee benefits editor for a major tax and financial publisher. I also successfully earned the CFP® certification in 2007. I subsequently taught tax, retirement planning, and estate planning for the College of Financial Planning's master's program. Each of these roles has required me to explain complex concepts in plain English, which is invaluable to serving as a trustee for the Church Pension Fund. I am articulate, well-versed in financial and tax concepts, and superior in facilitating consensus. I value the contributions of all persons and am adept in building bridges. I also appreciate the importance of confidentiality and reasoned judgment and analysis. I am interested in using my past professional experience and gifts to serve The Episcopal Church in manners outside my priestly role.

**The Rev. Thomas James Brown**

Winchester, MA  
 Parish of the Epiphany  
 Diocese of Massachusetts, Province I



As a current Church Pension Fund trustee, I am asking General Convention to support my candidacy to serve a second term. During the past six years, I have worked with others in support of CPF's fulfillment of its mandate to implement both a comprehensive lay pension program and a denominational health plan. I have been a leader in the restructuring of the governance of the CPF Board, and I am currently vice chair of its Benefits Policy Committee. As a parish priest and an experienced leader in the general Church, I bring a voice and a set of experiences that are as essential to our deliberations as the contributions of colleagues with investment, law, insurance, and publishing expertise. It would be an honor to continue to serve as a trustee of an Episcopal Church entity whose core values are compassion, fiscal stewardship, mutual respect, service, and adaptability.

**Ms. Roxanne Thomas Chargois**

Houston, TX  
 St. James' Episcopal Church  
 Diocese of Texas, Province VII



I bring 25 years of uninterrupted service in financial consulting, investments, insurance, and human resources management. My experience also includes working as a banking officer at Sears Bank and Trust (Chicago) and as a financial consultant and securities broker at Merrill Lynch (Houston). These positions required Series 6 and Series 7 licensure. My human resources experience was gained at Baxter International and at Sears Bank and Trust. I held the positions of human resources manager and human resources director, which focused on benefits, retirement, and compensation. I transitioned from the corporate world to a successful entrepreneurial business in the automobile industry. My primary responsibilities include financial management, employee benefits, insurance, and retirement. If elected, I would use my background and experience to ensure sound policy decision making, targeted investment strategies, broad financial benefit and retirement planning, and comprehensive analyses to stay abreast of the needs of the Church, clergy, and lay people we serve.

**The Rev. Robert W. Cowperthwaite**

St. Augustine, FL  
 St. Paul's Episcopal Church, Franklin, TN (Retired)  
 Diocese of Tennessee, Province IV



I have served congregations of various sizes and settings. I believe I resonate with the issues, hopes, expectations, and fears of clergy (especially) who look to the Church Pension Fund for retirement security. Over the course of at least four General Conventions, I attended hearings and spoke on several occasions on matters that came before the Committee on the Church Pension Fund. I followed the Committee action and reported to my deputation. I strongly supported adding lay pension benefits and have helped make that part of the compensation package for lay employees at St. Paul's. I have the ability to read and understand financial statements. I also have a history of pastoral care that would enable me to bring real faces and real-life situations to balance financial data. It would be an honor to serve our Church and all who participate in the Church Pension Fund.

**The Rt. Rev. Clifton Daniel III**

Philadelphia, PA  
Diocese of Pennsylvania, Province III



A lifelong Episcopalian, I have served and helped lead this Church in a variety of settings: as rector of parishes; as bishop of two dioceses in settings both rural and urban; and in a generously endowed parish as well as in a seminary in the midst of financial crisis. I know and give thanks for the breadth, strength, and vitality of the lay and ordained leadership of this Church as they faithfully serve God's mission and God's people. If elected to the Board of the Church Pension Fund, my aim will be to assist in maintaining the Fund in as healthy a state as possible and to fulfill the board's fiduciary responsibility through prudent management and growth. As a Board member, I will ensure that the lay and clerical beneficiaries of the Fund are cared for spiritually and financially in the most generous way possible.

**Mr. Stephen C. Edmonds**

Austin, TX  
All Saints' Episcopal Church  
Diocese of Texas, Province VII



My professional background includes nearly 20 years devoted exclusively to retirement fund administration and governance, leaving me well-grounded in investment, actuarial, and policy issues related to pensions and insurance. I have served as executive director of the \$2 billion City of Austin employees' retirement system and previously as director of the now \$7 billion Oklahoma employees' retirement system. I have been a trustee for two other statewide retirement systems and have also served as an assistant state insurance commissioner. I have been an active member of All Saints' Episcopal Church in Austin for many years and previously of St. Paul's Episcopal Cathedral in Oklahoma City. Service to these churches has included vestry, endowment board, investment committee, and more. I bring specific, relevant experience in meeting the challenges of providing reliable lifetime pension benefits to plan participants. It would be an honor to serve as a trustee for the Church Pension Fund.

**Mr. C. Bradford Foster III**

Memphis, TN  
Grace-St. Luke's Episcopal Church  
Diocese of West Tennessee, Province IV



As an attorney in private practice for 40 years, I focus in the areas of health care, nonprofit entities, fiduciary obligations, and public finance — all areas of responsibility of the Church Pension Fund. I have chaired the boards of numerous nonprofit organizations, most recently an Episcopal continuing care retirement facility serving more than 400 residents. I served as senior warden of my parish and serve now as chancellor of the Diocese of West Tennessee and as Church attorney for the Dioceses of Montana and Idaho. Our daughter is an Episcopal priest, and I have learned the importance of CPF for all those it serves. As a cradle Episcopalian and an Eagle Scout, I was schooled to live a life of service. My legal background and work for nonprofit boards has heightened my ability to listen to others and to keep an open mind. I ask for your vote to serve on CPF.

**The Very Rev. Dr. Chip Graves**

Huntington, WV  
 Trinity Episcopal Church  
 Diocese of West Virginia, Province III



There are four primary competencies relevant to my serving the Church Pension Group: servant leadership; executive management experience; investment and employee benefits experience; and experience with The Episcopal Church at all levels (local, national, international). As a member of the Cherokee nation, I realize the significance of diversity in our culture and the need for servant leadership. Given my corporate experience in managing financial assets, employee benefits, and a multimillion-dollar distribution company, my ministry focus has been to integrate my passion for service with corporate management experience. I have served diverse Episcopal parishes in addition to several local, national, and international boards (example: Christian Associates Food Pantry, Diocesan Council, Rotary International, and Kimoyo International in Ghana, Africa). Furthermore, I have been very active with Gathering of Leaders, the Consortium of Endowed Episcopal Parishes, and several international mission efforts. It is my hope to support CPF with my given talents and experience.

**The Rt. Rev. Julio Cesar Holguín**

Diocese of the Dominican Republic, Province IX



I am a pastor who is concerned about helping people in their spiritual and material needs. I am also an enterprising and creative person who likes to work in a team; at the same time, I respect the opinion of other people. I can work under pressure without losing control. I am an honest person and am loyal to the Church. I am always ready to learn, and I seek to achieve the objectives that I propose. I like to be informed about the status and progress of the economy on a world-wide, national, and local level. I also have good management of the budget of my Diocese and its investments. I like to share with my friends and sing when conditions permit it. At present, we have no representation of Province IX, and I hope to be chosen to be the representative voice of our clergy and laity on the Church Pension Fund Board.

**The Very Rev. Tracey Lind**

Cleveland, OH  
 Dean, Trinity Cathedral  
 Diocese of Ohio, Province V



As a current Church Pension Fund trustee (serving as chair of the Benefits Policy Committee and as a member of the Executive and Finance Committees), I have a deep concern for the health, welfare, and financial security of our clergy and lay employees and their families, as well as our churches and institutions. I bring 27 years of ordained ministry in urban and suburban settings, coupled with solid experience in the oversight of multimillion-dollar endowments, including review of investment managers, development of investment policies, and balancing of fiduciary and social responsibilities. In addition, I have a practical background in strategic planning, leadership development, and organizational ethics. Given the evolving climate and demographics of The Episcopal Church and the insurance and health care industries, I believe my experience, abilities, and commitment will continue to be of value as we serve CPF's clergy and lay beneficiaries. I would be honored to be reelected to the CPF Board.



**Mr. Kevin B. Lindahl**

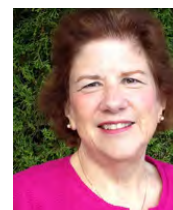
Denver, CO  
 St. Barnabas Episcopal Church  
 Diocese of Colorado, Province VI



I serve as general counsel of the Fire and Police Pension Association, the multi-plan, multi-employer, statewide government pension and disability system serving Colorado firefighters and police officers. We manage a \$4.5 billion investment portfolio, including manager selection, asset allocation, actuarial review, asset and liabilities studies, and strategic planning. I advise on issues including operations, benefit administration, investments, and federal law compliance. I have negotiated social responsibility issues and studied, advised, and lectured regarding fiduciary responsibilities. I articulate pension concepts to a broad range of audiences. I hold a BA in Economics, a JD, and an MBA. I have great respect for persons who pursue a life of service. My experience has been valuable during my first term as a Church Pension Fund trustee. I am excited to support those who serve us and The Episcopal Church in our rapidly changing world and would be honored to be reelected to the CPF Board.

**Ms. Sandra F. McPhee**

Evanston, IL  
 St. Matthew’s Episcopal Church  
 Diocese of Chicago, Province V



As an attorney with almost 40 years of estate-planning experience, and as a lifelong Episcopalian, I passionately believe our Church must adequately provide for all of its retired lay and clerical employees. I am a trustee of my own parish’s endowed funds and have served on boards of a wide variety of not-for-profits, focusing on the financial aspects of their work. I have a broad view of the Church, having served on the Executive Council (2003-2009), the Standing Commission on World Mission (2009-2015, chair 2012-2015), the Steering Committee of the Episcopal Partnership for Global Mission, and the Board of the Consortium of Endowed Parishes. I am currently on of the Standing Committee of the Diocese of Chicago. My skills include the ability to synthesize information, to ask tough questions, and to encourage compromise. If elected, I would bring all of my skills and passion to the CPG Board.

**The Rev. Dr. Tim Mitchell**

Louisville, KY  
 Church of the Advent  
 Diocese of Kentucky, Province IV



I have been a Church Pension Fund trustee since 2009 and currently serve as vice chair of the Investment Committee, as a member of the Audit Committee, and as director of Church Life Insurance Corporation. Serving as rector for the last six years of a growing urban parish in Louisville, I know the importance of supporting the financial, physical, and spiritual well-being of our Church’s clergy and lay employees. I also have an extensive background in the investment management of Church assets, having worked for 12 years as regional director of the California office of a socially responsible investment advisory firm, and before that as a corporate banker in Mexico City. In the Diocese of California, I served on the Investment Committee while completing a doctor of ministry degree in the area of faith and finance. It would be an honor to continue to serve as a CPF trustee.

**Ms. Margaret A. Niles**

Lake Forest Park, WA  
 St. Mark's  
 Diocese of Olympia, Province VIII



I would be honored to serve another term as Church Pension Fund trustee. I am an attorney with extensive experience serving pension funds and similar institutions in legal aspects of investments, fiduciary matters, and other issues. I have a long-time commitment to international development and understanding through service on nonprofit organization boards, pro bono legal services, and other work. These experiences enhance my awareness of the diverse needs of people around the world and in my own neighborhood. As a clergy spouse for 27 years, I appreciate on a personal level the needs of a clergy family and the importance of the Church Pension Fund. I offer my strengths in connecting people from different perspectives and backgrounds, working cooperatively and energetically, and focusing on the vision of the organization. I feel called to serve as a CPF trustee because I believe it is the best way to offer my gifts to the Church and its people.

**The Rev. Canon Altagracia Perez-Bullard**

New York, NY  
 Diocese of New York, Province II



All healthy institutions must be well equipped with leadership that can manage ongoing programs and services while planning for future changes in a way that is sustainable. I have a great deal of experience with organizations that are seeking to grow and serve in changing contexts, while providing important services to their constituencies. My academic research, Church, and community work equip me to facilitate the organizational work of visioning and prioritizing so that policy and practice effectively serve the mission of institutions that are called to be fiscally responsible and offer compassionate services. I bring experience in conflict resolution, especially across lines of race, class, ethnicity, gender, sexual identity, and religion. The increasingly diverse communities we seek to serve as Church institutional leaders require the ability to build on differences, addressing the challenges that this pluralism brings.

**The Rt. Rev. Brian N. Prior**

Diocese of Minnesota, Province VI



I am a lifelong Episcopalian who is blessed to have served the Church as a layperson, deacon, priest, and bishop. I have a business background and have had the good fortune to be a part of starting a number of nonprofit organizations that continue to provide resources and services in their communities. Presently, I have fiduciary responsibilities that include congregational, diocesan, educational institutions, senior housing, pooled investments; and camp, conference, and retreat centers. I have served with all of the above types of organizations through the changing employee-benefits system, including the implementation of the Denominational Health Plan. I am passionate about assisting our faith communities in becoming clear about their unique identities through discerning their particular gifts, engaging their local context, and creating sustainability through establishing missional partnerships. This passion, coupled with my experience, makes me a strong candidate to serve as a trustee for the Church Pension Fund.

**Mr. Kirby Purjet**

Knoxville, TN  
 Diocese of East Tennessee, Province VI



I have 35-plus years serving several parishes as business administrator. In that capacity, I have been the primary point of contact regarding employee medical and retirement benefits as well as property and liability insurance. As an end user of the services and products offered by the Church Pension Group, I am keenly aware of the value — and sometimes burdens — of service delivery at the local level. I have made it a point to engage CPG staff in conversations about process improvement. I believe that the end-user voice is important, if not critical, to that end. I am now serving as diocesan administrator, representing a larger number of parishes. From that perspective, from my experience as parish administrator, from my involvement with parish administrators across the country, and as a lay employee of the Church, I believe that I can represent the larger lay employee community and administrative needs of the local parish.

**The Rt. Rev. Gregory H. Rickel**

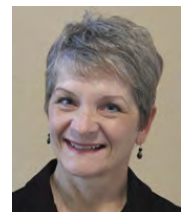
Diocese of Olympia, Province VIII



Throughout my life, I have had a great interest in the ministry of health and wellness. I hold a master's degree in Health Services Administration and a master's in Interpersonal and Organizational Communication, and I was a successful administrator in health care management for seven years before entering seminary. This is a passion and interest that I would like to dedicate to The Episcopal Church, which I serve and love.

**Ms. Lisa Sargent**

Carmichael, CA  
 St. Michael's Episcopal Church  
 Diocese of Northern California, Province VIII



My pension and health benefits program management career with two of the largest pension systems in the country (CalPERS and CalSTRS) has provided me with the knowledge, skills, and insight to effectively perform the strategic, policy, and fiduciary oversight required of a Church Pension Fund trustee. In pension systems of such complexity, change was a constant as we assessed the evolving environment to position the organization and membership for the future. The Church is faced with numerous challenges, and we must be open and accepting of change to prosper in a dynamic and diverse world. I am active in leadership in my parish and my diocese and have served on the CPF Legislative Committee for two General Conventions. I feel called to use my expertise to ensure that the CPG explores every opportunity to better serve the evolving needs of the Church and its employees by providing high-quality, cost-effective health and pension benefits.

**Mr. Dennis E. Stark**

Pawtucket, RI  
 St. Martin's Episcopal Church  
 Diocese of Rhode Island, Province I



I am a community and Church leader with Board-level skills and experience in governance, financial affairs, and investment management. I believe that the Church Pension Fund is a great asset of the Church, and if elected I would work to keep it financially strong and responsive to the retirement needs of our clergy and lay employees.

I am treasurer of my parish and have been treasurer of the Rhode Island Diocese. I am currently a member of their Standing Committee and have served on Diocesan Council, on the Finance Commission, and as chair of the Compensation & Benefits Committee.

I have served as a deputy or alternate to General Convention since 2000, on Executive Council, and as a member of the Investment and Joint Audit Committees. I am treasurer of the Episcopal Divinity School and serve on its Audit, Executive, Finance, and Investment Committees.

**Mr. Edgar Starns**

Baton Rouge, LA  
 St. Luke's Episcopal Church  
 Diocese of Louisiana, Province IV



It has been my privilege to serve as a Church Pension Fund trustee since 2009. Currently, I am Chair of the Audit Committee and serve on the Benefits Policy Committee. In my professional life, I am a director of my firm's employee benefit practice, which encompasses defined-benefit and defined-contribution plans as well as health and welfare plans. This experience has been most helpful in the discharge of my fiduciary obligation to CPF and its beneficiaries. My entire work history has involved fiduciary responsibility and the administration of various employee-benefit plans. If chosen to serve another term, I will remain committed to using my experience and my professional background to overseeing the administration of our plans in a sound and prudent manner to the benefit of the Church's clergy and lay employees, encouraging and nurturing our future leaders, and keeping our promises from generation to generation.

**Ms. Sandra S. Swan**

Chocowinity, NC  
 St. Paul's Episcopal Church, Greenville, NC  
 East Carolina, Province IV



I have the skills and experience to continue being an effective advocate for Church Pension Fund beneficiaries throughout all provinces of the Church. As a current trustee, I have served on the Benefits, Finance, and Audit (vice chair) Committees, monitoring CPF's excellent financial stability and sound benefit programs. I have served our Church and its people on all levels: I was president of Episcopal Relief and Development for six years and served on Standing Commissions and national Church Task Forces and vestries, and I am now my parish's director of resource development. I authored *The New Outreach*, a guide to effective church programs. I delivered the 2012 Virginia Theological Seminary Mollegen Lecture, "Plain Talk about Church Talk." For 30 years, I led nonprofit programs in disaster relief, health, welfare, and development. Academic accomplishments (MA, MBA, and DHL from Berkley Divinity School) give me a solid foundation for the responsibilities of Pension Fund trustee.

**Canon Anne M. Vickers, CFA**

Tampa, FL  
 St. Mark’s Episcopal Church  
 Diocese of Southwest Florida, Province IV



My work and ministry as canon for finance and administration of the Diocese of Southwest Florida is deeply engaged with the business methods that serve the Church. As a chartered financial analyst, I’m equipped to perform the highly technical fiduciary responsibility of a Church Pension Fund trustee. My experience as a trusted adviser to churches fuels my passion for the benefits of detailed analysis, effectively communicated with a clear alignment of goals. I seek and find indicators of success and opportunity, and I will enthusiastically drive innovative ways to extend best practices. Technology extends my capacity, and I jump at the chance to use it. As an active diocesan partner with each of the Church Pension Group businesses, I know I’ll hit the ground running — eager to contribute analysis and strategic insight to uphold the strength and vitality of the Church Pension Fund in the context of the future of our evolving Episcopal Church.

**The Rev. Canon Dr. Sandye A. Wilson**

South Orange, NJ  
 The Episcopal Church of St. Andrew & Holy Communion  
 Diocese of Newark, Province II



I am a systems thinker who has long worked to connect the practical realities of active ministry with the pastoral challenges of funding, support, long-range planning, insurance issues, health, and the skilled management of funds to meet these challenges. I also care very much about what makes us responsible stewards and about the call to share some of our abundance with those who have labored in vineyards that have not provided adequate hope for their futures. I am a reasonable team player who brings experience in ethics, investments, economics, finance, pastoral care, liturgy, and hope. I have gifts and passion in creative planning, clergy development as a mentor and coach, congregational vitality, and leadership development. I work well with people on all sides of the spectrum. I pray regularly and listen well. I hope to use these skills well as a trustee of the Church Pension Fund.

**Mr. Robert H. Wootten**

Des Moines, Iowa  
 St. Paul’s Cathedral  
 Diocese of Iowa, Province VI



I have been in the investment business my entire career, and I understand what is needed to be successful. I understand the risks associated in successful investing and business management. I understand the importance of the Fund to those whose lives have been devoted to serving God and the Church. Their sacrifice to the service of others is rewarded with the knowledge of a more secure retirement, and it is to that end that I feel I can best serve. It is critical to know the objectives of the funds and to implement strategies to meet those goals, while understanding risk tolerances, the time involved, what measures and defines success, and the accountability of those involved. I will work to see that the beneficiaries of the funds can expect what has been promised to them, as success is directly related to the individual whose retirement is entrusted to us.

## Disciplinary Board for Bishops

### Position Description

From Canon IV.17.3: "The Disciplinary Board for Bishops is hereby established as a court of the Church to have original jurisdiction over matters of discipline of Bishops, to hear Bishops' appeals from imposition of restriction on ministry or placement on Administrative Leave and to determine venue issues as provided in Canon IV.19.5. The Disciplinary Board for Bishops shall consist of ten Bishops elected at any regularly scheduled meeting of the House of Bishops, and four Priests or Deacons and four lay persons initially appointed by the President of the House of Deputies with the advice and consent of the lay and clergy members of the Executive Council and thereafter elected by the House of Deputies. All lay persons appointed to serve shall be confirmed adult communicants in good standing. Members of the Board shall serve staggered terms of six years, with terms of one half of the Bishops and one half of the lay persons, Priests and Deacons collectively expiring every three years, with the first expirations occurring at the end of the year 2012."

At this convention, the House of Deputies will elect two clergy and two lay members.

### Competencies & Qualities

Members of the Disciplinary Board for Bishops should be well-versed in the Canons; should understand the goals and processes of Title IV; should embrace a process that includes reconciliation as well as justice; and should be able to articulate that goal in a way that does not deny or diminish the hurt of those who are feeling wronged. Compassion, dedication to finding solutions or resolutions that uphold the Canons in a manner that serves the overarching goal of reconciliation, and clarity about acceptable or unacceptable behavior are all essential qualities for board members. Analytical thinking and the ability to balance the letter and spirit of the law are equally essential. It is vital that incumbents have computer literacy and internet access.

### Duties of This Office

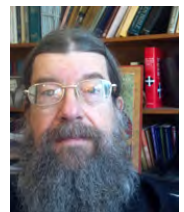
Members attend one two-day, face-to-face meeting at the beginning of the triennium; all other work is done via conference call.

The Reference Panel is staffed by the Intake Officer, the President of the Disciplinary Board for Bishops, and the Presiding Bishop; this Panel handles the majority of the work. Members of the DBB may be appointed to the Conference Panel or the Hearing Panel.

Other information: The DBB's work includes significant paperwork that must be digested or processed.

### The Rev. Paul A. Colbert

Coarsegold, CA  
St. Raphael's, Oakhurst/Holy Trinity, Madera  
Diocese of San Joaquin, Province VIII



The Church is called upon to model a different way of engaging conflicts than is society. The current Title IV canons offer a model for reconciliation and discipline as each situation warrants. I currently serve on the Joint Disciplinary Board for the Dioceses of California, El Camino Real, Northern California, and San Joaquin. As president, I have worked on Reference Panels with bishops committed to health and healing for both congregations and clergy as conflicts have arisen. As a priest in San Joaquin, I have heard stories of pain caused by the action of a previous bishop. I have also heard stories of healing and reconciliation as

time has moved forward. My underlying gifts to this Board will be that of listening and discernment — the fruit of work as an engineer, housing counselor, advocate for the homeless, proponent of nonviolent engagement, priest, monk, and a disciple of Christ.

**Fr. Donald R. Hands, PhD**

Savannah, GA  
Diocese of Georgia, Province IV



I believe I have the background, knowledge, and experience to be a competent and compassionate member of the Disciplinary Board. Being a priest and a clinical and forensic psychologist with 40 years' experience dealing with the seamier side of life, I am not surprised by human foibles, sin, and misconduct. I have seen God's awkward grace working in the darkness to provide not only justice but also healing. I spent seven years working with more than 400 impaired clergy and bishops, then 17 years with inmates and have seen almost every kind of victimization, whether financial, domestic, sexual, or physical. I was the only non-Roman member of the Roman Catholic Archdiocese of Milwaukee Clergy Review Board under then-Archbishop Timothy Dolan. I believe there is no healing without justice, but 'an eye for an eye' alone will not bring about healing. I believe in due process and in restorative and creative justice.

**The Rev. Canon Suzann Holding**

Glen Ellyn, IL  
St. Mark's Episcopal Church  
Diocese of San Diego, Province VIII



In all likelihood, I would not have sought nomination for the Disciplinary Board for Bishops had I not served as canon to the ordinary/diocesan intake officer during the time of the transition to, and the implementation of, the "new" Title IV canons. However, those two roles enabled me to have a deeper understanding and knowledge of this process of accountability, which is grounded in our baptismal vows and strives to find a way through hurt, betrayal, conflict to healing, repentance, forgiveness, restitution, justice, amendment of life, and reconciliation. Implementation of the process has shown in some cases how difficult that can be, and we continue to learn as we live into this new way of being in community. I believe that my experience and training in conflict resolution, combined with my listening, pastoral, problem-solving, and negotiating skills, would serve the Board well.

**Ms. Leanora Kovacs**

Clinton Corners, NY  
Church of the Messiah  
Diocese of New York, Province II



I went to law school as an adult because of a love of the law in its highest form and its use to clarify issues and enable the resolution of conflict. As I have grown in my profession and in my faith, I have continued to value the law in all its manifestations, including those governing the life of the Church. In my work life, I struggle on a daily basis with the complexities of conflict, and I have a deep understanding of the subtleties involved in issues of misconduct. What I strive for is discernment, respectful resolution, and an honoring of differing points of view and experience, while keeping in mind the requirements and

limitations that structure legal situations. I am skillful at facilitating a broader vision in times of stress and transition and would bring those skills to this position.

**The Rev. Erik W. Larsen**

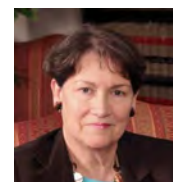
Middletown, RI  
 St. Columba’s Chapel  
 Diocese of Rhode Island, Province I



I have served as a priest for 33 years with 12 bishops (diocesan and suffragan) in Connecticut and Rhode Island and in the (then) extra-provincial Diocese of Hong Kong. I have also participated in Diocesan Executive Council and Standing Committee and was a member of the General Convention ‘77 deputation. As canon for Transition Ministry, I worked with bishops and senior staff with parishes in transition for five years, with particular training in conflict management, resolution, and transformation. I have studied with Speed Leas of the Alban Institute; Plowshares Institute, where I was certified as a trainer of trainers; and with Lombard Mennonite Peace Center. In Connecticut I was part of the Pastoral Response Advisory Committee, and I am presently a Title IV advocate in Rhode Island. I hope that my listening skills as an experienced mediator and my working relationships with deacons, priests, and bishops throughout the Church will inform my role on the Board.

**Ms. Melinda A. Lucka**

Charleston, SC  
 Grace Church, Charleston  
 The Episcopal Church in South Carolina



I have been an Episcopalian for the past 27 years. During that time, I have served on my parish vestry and in various diocesan roles: as an advisor to the committee to reorganize the Diocese after our 2012 division; in Standing Committee; and in the Constitution and Canons, Credentials, and the Resolutions Committees for our reorganizational Conventions in 2013. The C&C work was tedious but necessary, as the former leadership eliminated all references to The Episcopal Church, in spirit and in polity.

From 2006-2013, I served in leadership capacities for the Episcopal Forum of South Carolina, an organization whose mission was to maintain TEC presence within our Diocese. In 2011-2012, I compiled abandonment actions under the 2006 and 2009 disciplinary Canons, and a Title IV complaint regarding our former bishop. I am a civil litigator and a criminal prosecutor; however, I am also a trained mediator, believing that sensitive legal issues should be resolved, without litigation, if at all possible.

**Mr. Marcellus Smith**

Birmingham, AL  
 St. Mark’s Episcopal Church  
 Diocese of Alabama, Province IV



As a lifelong member of The Episcopal Church and having been an active member in three different dioceses, I have a deep appreciation and love for The Episcopal Church.

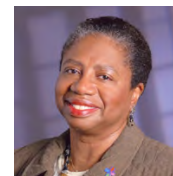
I have been elected by the Diocese of Alabama to six General Conventions and have served on the Canons Committee for five Conventions. I have served as secretary to the Standing Committee on Constitution and Canons for the past five years. Being a part of the process in writing the new Title IV gives me a unique perspective on not just the Title’s law, but also on the intent, spirit, and reconciliation components of the Title IV process.



Thus this unique understanding of the process, along with more than 35 years of corporate management experience that involves personnel matters, has equipped me to be able to fairly and actively listen to each situation that comes before the court.

**Ms. Deborah Stokes**

Westerville, OH  
 St. Philip Episcopal Church  
 Diocese of Southern Ohio, Province V



My competencies and skills in facilitation and reconciliation were enhanced during my role as public health social work administrator for the State Department of Health. During that time, I helped to develop treatment and prevention programs addressing the psychosocial issues impacting on the health and welfare of families in Ohio. As a consequence, I have been able to utilize my competencies and skills as deputy to General Convention, Title IV Review Committee, Executive Council, and Diocesan Standing Committee. Each position has called for knowledge and skills in reconciliation, facilitation, and the Canons. I have enjoyed serving the Church. I feel that my background, experience, and God’s gift of servant leadership will serve me well on the Disciplinary Board of Bishops with compassion, love, and humor. If elected, I will represent the Church to the best of my ability.

## The Executive Council

**Term of office:** 6 years

**Number to be elected:** 6 lay persons, 2 presbyters or deacons, 2 bishops

**Position Description**

Members carry out the program and policies adopted by the General Convention and have charge of the coordination, development, and implementation of the ministry and mission of the Church. The Executive Council is required to manage the budget of the Church, to submit to General Convention a budget for the next triennium, and to make annual reports to the Church of receipts and disbursements and a statement of all trust funds and properties. Members also serve as the Board of Directors of the Domestic and Foreign Missionary Society. The Council does its work within five standing committees: Local Ministry and Mission, Advocacy and Networking for Mission, World Mission, Finances for Mission, and Governance and Administration for Mission.

**Qualities & Competencies**

In addition to attendance and participation in Executive Council meetings, members are often appointed to task forces and special working groups that function between Council meetings. All nominees must have a commitment to this ministry and the time to participate fully. Council members need a deep commitment to God’s mission in the Church and world, strong faith, openness to new ideas, flexibility, the ability to communicate in small and large groups, the capacity to engage with staff members from the Episcopal Church Center, and a broad perspective of the Church on a local and global scale. Specific skills and gifts are desired in the areas of: understanding of the workings of the Anglican Communion and The Episcopal Church, finances and budget management, organizational development, proven advocacy skills, good communication abilities, and the planning, implementation and completion of assignments. It is helpful to have familiarity with conference-call technology such as Adobe Connect. It is vital that applicants have computer literacy and internet access.

**Duties of This Office**

Number of meetings per year: Three (February, June, and October)

**Additional Information**

Standing Committees and Task Forces of the Council may meet either by teleconference or in person for two or three days excluding additional travel time in the interim between Council’s regular meetings. For additional information, see Canon I.4. Appointments may be made to some CCABs as liaisons.

**Bishop Nominees to the Executive Council**

There are two (2) available positions, for six-year terms. The House of Bishops elects these members; the House of Deputies confirms the election.

**Lay Person Nominees to the Executive Council**

There are six (6) available positions for six-year terms. The House of Deputies elects these members; the House of Bishops confirms the election.

**Clergy Nominees to the Executive Council**

There are two (2) available positions, for six-year terms. The House of Deputies elects these members; the House of Bishops confirms the election.

**The Rev. Jabriel Simmonds Ballentine**

Orlando, FL  
 Episcopal Church of St. John the Baptist  
 Diocese of Central Florida, Province IV



As an under-40 black male of both Caribbean and Black American lineage, I bring an understanding of diversity that would benefit the Council in development of its communication to, and advocacy on behalf of, ethnic communities. With my political acumen and organizational development experience, I would be an asset to the Council in envisioning what the structure of the Church should look like and in developing the strategy for moving people to that vision. Most importantly, as a committed theologian, I will work to help our deliberations to be undergirded by sound theology.

**The Rev. Yamily Bass-Choate**

Yonkers, NY  
 San Andres’ and St. Paul’s  
 Diocese of New York, Province II



The energy I have for mission increases daily, and I owe my proactive leadership style and creative problem-solving to that passionate energy. I am a member of the national Church’s Trust Fund for Hispanic Theological Education and a trustee for the Board of the General Theological Seminary, and I serve on the Advisory Board for *The Episcopal New Yorker* and on the Community Advisory Committee for the City of Yonkers. Working across the table and communicating effectively with local and international community and Church leaders, I am guided by faith in the mission and evangelism of the Anglican Communion. As a priest in an urban setting, I am committed to carrying out God’s mission in the Church and the world with innovative programs to nurture and vitalize our community, especially when funding is low and fiscal responsibility is a priority. My strengths in the financial management of two parishes, dedication to collaborative administration and Church development, and a deep sense of God’s Grace are the gifts I will bring to the Executive Council if elected.

**The Rev. John F. Dwyer**

Minneapolis, MN  
 St. Christopher's Episcopal Church  
 Diocese of Minnesota, Province VI



I am faithful, spiritual, organized, and an individual who likes to think outside of the box. I am a problem solver and a change agent who works within formalized structures and can still effectuate substantive change. I am not afraid to take on issues and structures that are thought to be problematic (please see my published book, *Those 7 References: A Study of the References to Homosexuality in the Bible*). I hope to utilize my skill set and background as an attorney to assist The Episcopal Church in moving fully into the missional mindset, thereby breaking down barriers to change that thwart our living into Christ's charge to all of us: to help the poor, the homeless, the orphan, the widow(er). We are called by our baptismal covenant to respect the dignity of every human being; we cannot allow structures or entrenched bureaucracy to get in the way of our truly living into those vows and Jesus' instructions.

**The Rt. Rev. Carol J. Gallagher**

Diocese of Montana, Province VI

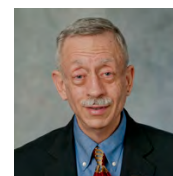


In my 13th year as bishop, I have experienced the breadth of the Church in many dioceses and unique locations. I bring to this role a wealth of experience and skills as well as an inquiring mind and a compassionate heart. As an Indigenous woman and mother, I bring a commitment to building relationships, building bridges, and the radical hospitality needed to renew the life of our Church.

In working with the people involved in the Bishops' Native Collaborative, I have found that despite our differences theologically and otherwise, we have much in common and much to share. I do believe we are called by Christ to build and be a meeting place, a place of welcome and renewal for all people. I believe The Episcopal Church has unique gifts to offer the wider communion and the world. I would like to be a part of that growth and transformation.

**Mr. E. Bruce Garner**

Atlanta, GA  
 All Saints' Episcopal Church  
 Diocese of Atlanta, Province IV



Age and experience have provided me with skills and competencies relevant to serving on Executive Council. Serving as Lay Deputy to General Convention 2015, and as alternate or first alternate to GCs during 1994-2012, provide me experience with the extensive changes that have occurred in our Church. Serving on nonprofit boards for over 30 years has provided me experience with changes and transitions, particularly in the governance arena. Serving my diocese on its Executive Board, chairing our Bishop's Consecration Committee, and chairing our Commission on AIDS and Commission on LGBT Ministry keeps me connected to those represented in the broad spectrum of God's created humanity. My role in God's mission in my parish fulfils and challenges me. My propensity to ask difficult questions and to seek improved ways of engaging in ministry gives me additional talents needed for service on Executive Council. Thinking younger, while growing older, meshes experience with flexibility in seeking better ways to accomplish the work of our Church.

**Mr. Louis W. Glosson**

San Jacinto, CA  
 Church of the Good Shepherd  
 Diocese of San Diego, Province VIII



Three themes center me: serving God by example, listening to God’s people, and serving God through ministry to youth. I have honed my skills in listening, interpretation, mediation, and action. As senior warden, I focused my attention on financial matters, construction, and building a new education facility. As stewardship chair, I lead by the example of financial commitment on “a fixed income.” In the parish, as football or basketball coach, and as youth director and regional director of the Union of Black Episcopalians, listening intently and working with the person toward resolution is key. I’ve engaged the whole person and spent time to develop different perspectives — whether with young adults in crisis, with young children learning to sing a new song, or with white parishioners understanding the contributions of African Americans to The Episcopal Church and the impact of racism on us as Christians. Having served as alternate, then deputy to past General Conventions, I look forward to continued service.

**Ms. Mayra Liseth Gonzáles Polanco**

Catedral Episcopal El Buen Pastor  
 Diocese of Honduras, Province IX



In much of my career, I have facilitated and organized groups of missionaries who have come to Honduras to work either with medical missions in rural communities or with humanitarian groups who work with the girls at Our Little Roses. I have learned to build consensus, to resolve disputes, and to organize deep-rooted experiences for the missionaries and the people they serve. I’m bilingual and computer-savvy, and I work well setting and achieving goals among diverse groups through communication, cooperation, and clearly defined steps. I can bring all of these skills to the Executive Council of The Episcopal Church. My experience with The Episcopal Church in the Ninth Province and with national Church organizations has given me an expanded vision of The Episcopal Church at large as well as of the diversity and missions in the Ninth Province.

**Ms. Julia Ayala Harris**

Norman, OK  
 St. John’s Episcopal Church  
 Diocese of Oklahoma, Province VII



My passion is helping organizations live out their goals in ways that are true to their values, identity, and mission. I have a background in nonprofit management, specifically organizational development and change management. I have had various experiences in restructuring organizations — from Church-based relief and development agencies in South Sudan to homeless ministries in Florida. Currently, I serve as the Episcopal Church Women United Thank Offering Board chair for the Diocese of Oklahoma. Additionally, I am a member of the Task Force for Reimagining the Episcopal Church (TREC), in which I have had the profound experience of listening to the concerns and hopes about the future of our Church from Episcopalians at all levels. I would like to bring these experiences from TREC, my career, and my love for our Church to Executive Council as we begin the process of living out our mission in the midst of organizational change in the next triennium.

**The Rev. Robert “Moki” K. Hino**

Hilo, Hawaii  
 Church of the Holy Apostles  
 Diocese of Hawaii, Province VIII



My journey as a full-fledged Episcopalian began in The Episcopal Church in Micronesia when I was 30 years old. Since my ordination to the priesthood in 2006, I’ve been called to serve at various levels in the church: as EYE 2008 Design Team Member, General Convention Deputy 2009, contributing author for the Lifelong Christian Formation Charter, and as member of the Standing Commission on Lifelong Christian Formation and Education. In addition to my diocesan roles of Standing Committee member and Diocesan Convention Secretary, I am also chair of the Hawai’i deputation to General Convention 2015. These experiences affirm my passion for offering myself to the Church in ways that I find interesting and exciting. As an Episcopalian born and raised in the Western Pacific, I also offer a new and different perspective to our mission and ministry as disciples committed to seeking and serving Christ in all persons, and to respecting the dignity of every human being.

**The Rt. Rev. Santosh K. Marray**

Birmingham, AL  
 Diocese of Alabama, Province IV



I have served as a member of the Diocesan Commission on the Ministry, Diocesan Council, and Diocesan Finance Committees, including on national commissions in several countries. In parish ministry, I have led several congregations through change and transition in vital ministry. I have also led numerous capital campaigns for capital development, including in planting new congregations. I believe in the essentials of collaboration, collegiality, and mutual accountability as significant benchmarks of our stewardship and common life as a Church. I am a vocal proponent and servant of the mission of God and the Church called to live it.

As bishop, I have administered a diocese that was severely under-resourced and have witnessed what prudent and accountable leadership can achieve when we skillfully and strategically exercise our stewardship to God and the Church. I strongly believe that my wide spectrum of experience in the life of the Church across the Anglican Communion would serve well in helping me be an effective member of the Executive Council.

**Mr. Albert (Ted) Mollegen, Jr.**

Glastonbury, CT  
 St. James’ Glastonbury Episcopal Church  
 Diocese of Connecticut, Province I



My competencies include collaboratively casting an inspiring practical vision for an organization 's future and collaboratively strategizing the best way to create that future, including developing the human and financial resources need to carry out that strategy. Because it is easy to see deficiencies and make improvements to what someone else has initiated, I have composed a draft The Episcopal Church (TEC) Grand Strategy (<http://www.mollegen.net/GC2015>). I hope to get the Executive Council and Church Center senior staff to take it over, own it, and continuously evolve it into what TEC needs to improve its future.

Other competencies include forming alliances with key individuals in various parts of TEC to work together toward common visions and goals, and facilitation of small groups so that the knowledge and creativities

of all group members (including me) are used in solving important problems and/or building effective plans for the future.

**Canon Dr. Steven Nishibayashi**

Glendale, CA  
 St. Mary's (Mariposa)  
 Diocese of Los Angeles, Province VIII



I am a lifelong Episcopalian and lifelong learner committed to personal and professional service; my life is a dynamic process of discernment. In my experience, volunteer service to a mission to which I am sympathetic and dedicated repays in gifts greater than the individual investment. I rejoice in the diversity of tradition within The Episcopal Church but believe traditions should evolve to adapt to the present and prepare for the future. Our lives are mutually enriched when we share with, listen to, and learn from one another. I bring a wealth of experience in a variety of local and diocesan settings as an interviewer and facilitator. I have the time, interest, and energy to devote to the work of Executive Council. I pray my experience and talents can serve the wider Church, embrace its current richness, and cultivate and prepare a richer, more fulfilling, more diverse, and more inclusive future.

**Mr. Brendan O'Sullivan-Hale**

Indianapolis, IN  
 Episcopal Church of All Saints  
 Diocese of Indianapolis, Province V



I had no religious affiliation before being baptized in The Episcopal Church as a college student in 1997. Apart from my conversion, the most rewarding spiritual experience of my life was serving as senior warden of my parish during a high-anxiety period of clergy transition and serious budget stress. Getting through this time involved building the confidence of lay leaders, transforming our culture of financial giving, changing our expectations of clergy leadership, and deliberately aligning our budget with mission. The parish grew both in numbers and faithfulness as a result. My recent work as convener of the Diocesan Reimagining Task Force in Indianapolis has similar aims. My professional experience as an investment analyst provides me comfort in working with budgets and complex organizations; my personal experience of Jesus convinces me that our call is not to manage our decline but to seek new ways to make disciples and serve others.

**The Rev. Steven J. Pankey**

Foley, AL  
 St. Paul's  
 Diocese of Central Gulf Coast, Province IV



I'm a husband, a father, a priest, and a blogger. My blog is a member of the Christian Century Blog Network and has been featured on *The Text This Week*: writing my thoughts on the lectionary (and occasionally, the Church) at *Draughting Theology*. Whether it is through my writing, engaging in strategic discernment in my congregation, working with a team to restructure our diocese, or in my studies for a DMin at Sewanee, much of my work involves imagining a Church equipped for mission in the 21st century. Having served on various boards of directors, both within and beyond the Church, I've developed a strong belief that good leadership can change a culture, and I am certain that The Episcopal Church can be the leading voice in bringing about the kingdom of God in the world today. I look forward to being a part of that leadership effort.

**Ms. Holli S. Powell**

Lexington, KY  
 Church of the Holy Trinity  
 Diocese of Lexington, Province IV



I became an Episcopalian in 2004, having been drawn to the Church by the publicity surrounding the consecration of Bishop Gene Robinson. Since then, I’ve been active in all levels of our Church, from serving as a parish treasurer and vestry member, to being employed for five years as the deputy for financial affairs in the Diocese of Lexington, to assisting as a staff consultant to the Programs, Budget and Finance Committee of the 2012 General Convention in Indianapolis. My background in nonprofit auditing and finance, especially in the finances of Church structures, pairs well with my lifelong interest in personal and organizational leadership to serve our Church through Executive Council. However, I am propelled by my belief in a Church that teaches us to respect the dignity of every human being, by my love of Jesus, and by my desire to see what our community of devoted believers can do for our world.

**The Rt. Rev. Bavi Rivera**

Cove, OR  
 Diocese of Eastern Oregon, Province VIII



Living on the West Coast, in the None Zone (where the largest religious affiliation is ‘None’), I find that ministry always includes looking at new ways of doing and being Church. From leading my first youth ministry right out of college to my current episcopate in Eastern Oregon, I have served in times and places that seemed to be marked by scarcity where there was once abundance of people and resources. This has called forth creativity, collaboration, and vision from me and from the people with whom I have served. It is exciting and sometimes a bit scary. Yet we find new ways to do ministry: for example, by moving from the youth-group model to contact-point ministry, by using buildings in new ways that invite in neighbors who may or may not join the congregation, and by working in partnerships with other folks in our communities — especially our Lutheran counterparts.

**Ms. Nina Vest Salmon**

Lynchburg, VA  
 St. John’s Church  
 Diocese of Southwestern Virginia, Province III



Love for the community of faith that is The Episcopal Church is the greatest strength I have to offer. My gifts are not with budgets or numbers. As an English professor, I work better with words and with people. I’ve learned to work with budgets as statements of mission and can step back to see the big-picture goals of priorities and choices that budgets suggest. A professed lover of meetings (most especially when well run and purposeful), I have high energy for the work of the Church. It is my conviction that a solid infrastructure will provide clear space in which to live, to love and worship God, and to follow Jesus Christ.

**The Rev. Augusto Sandino Sánchez Pujols**

Santo Domingo, Dominican Republic  
 San Jose  
 Diocese of the Dominican Republic, Province IX



For more than 40 years (34 of them in the Church), I have shown faithfulness, patience, discretion, and strict adherence to the laws, rules, and canons. My aptitudes are determination, consistency, and persistence. When I begin any project for the development of my family, the Church, or to improve the lives of the communities where I have worked, I do not abandon it until it culminates in success, empowering as many people, both in the process and in what is achieved. Moreover, the Lord has blessed me with the facility of reconciling people with whom I interact. Hence, to be elected to be part of the Executive Council of The Episcopal Church, I could serve that high body with that capacity, to contribute toward harmonizing the differences of opinions and options, reconciling and helping to work in peace and efficiency.

**The Rt. Rev. Dabney T. Smith**

Parrish, FL  
Diocese of Southwest Florida, Province IV



As a multigenerational and life-long Episcopalian, I am passionate about our Church. I value our traditions and our ability to proclaim the Gospel in fresh ways in expanding environments. I believe I am a team builder and strong listener who seeks reconciliation in problem solving. I understand myself to be an evangelistic pastor-leader who seeks to challenge people for faith maturity, organizational health, and purpose. I believe it is important to consistently realize and articulate current reality, while taking the long view toward the future we try to create within God’s will. This demands the best efforts in maintaining healthy relationships in the midst of issues that are sometimes confusing or divisive. I would seek to use my approach to leadership to assist the Executive Council in leadership that connects with the people in our congregations and calls them to deeper faith experience and expression.

**Mr. John (Jack) R. Tull**

St. Augustine, FL  
Church of the Redeemer  
Diocese of Florida, Province IV



I seek election to the Executive Council so that I can use my 42 years of leadership experience at the parish, diocesan, and The Episcopal Church (TEC) levels to do the work of the Executive Council, its work groups, and its task forces. I also bring gifts from my broad experience in TEC through mission and ministry, especially with Episcopal Relief and Development and Millennium Development Goals. I am retired and can devote full time to the work and vision of General Convention and the Executive Council and will insure to the best of my abilities that the directions received from General Convention are carried out in a timely and effective manner. As a four-time deputy to General Convention, I believe that I have a working knowledge of the major issues facing TEC, and I would use that knowledge to assist with the important work of Executive Council.

**Dr. Miguel Edgardo Umaña Erazo**

El Buen Pastor Catedral  
Diocese of Honduras, Province IX



I am a medical doctor with a master’s in public health and epidemiology, teacher, and chair of Public Health at the University of Honduras. I was an adviser to the Ministry of Health from the Pan American



Health Organization (PAHO). These experiences have given me the ability to do great things with limited resources.

I have been extensively involved in the life, worship, and governance of The Episcopal Church for the past 23 years, both in Honduras and the United States. I have been faithful in serving the assignments entrusted to me by the local, diocesan, and national Church, serving God and his people. My blessing is that my family is also very involved in Church life and supports my ministry as a layperson devoted to serve. I believe that I have the various skills needed for leadership to support the implementation of the tasks assigned to the Executive Council and the resolutions adopted by our Church's General Convention.

## General Board of Examining Chaplains

**Term of office:** 6 years

**Number to be elected:** 3 lay persons; 3 faculty members of theological seminaries or other educational institutions; 3 presbyters with pastoral cures or in specialized ministries; 2 bishops. The House of Bishops elects; the House of Deputies confirms elections.

### Position Description

GBEC members write the annual General Ordination Examination (GOE) administered to candidates for Holy Orders. They also produce background material for readers of the examination papers. Some board members read exams; others supervise teams of readers; others review and approve written evaluations for all responses to GOE questions. At its meetings the Board, made up of 22 members total, evaluates and plans for the succeeding year's work. The Board is made up of bishops, priests with pastoral cures or who are involved in specialized ministries, lay or ordained members of accredited seminary faculties or other educational institutions, and lay persons with particular expertise.

### Qualities & Competencies

Previous experience on a diocesan Commission on Ministry, Standing Committee, or as a former reader of GOEs is helpful. It is vital that applicants have computer literacy and internet access. Nominees should have an interest in theological education and some expertise in one of the seven canonical areas. Board members should be able to work comfortably in teams and task groups. GBEC assignments demand ability to concentrate intently on tasks at hand. Competency in testing methods and procedures is useful. It is helpful to have familiarity with conference call technology such as Adobe Connect. It is vital that applicants have computer literacy and internet access.

### Duties of This Office

Number of meetings per year: Three (February, June, and October); 7 days plus videoconference call. In addition, members spend approximately 60 hours reading examinations at home for answers in one canonical area.

N.B.: Not all members of the Board will be readers for the GOEs. First-year members will attend the readers' meeting and will read exams along with other readers. For additional information, see Canon III.15.

### Bishop Nominees to GBEC

There are two (2) available positions, for a six-year term. The House of Bishops elects this member; the House of Deputies confirms the election.

### Lay Person Nominees to GBEC

There are three (3) available positions, for six-year terms. The House of Bishops elects these members; the House of Deputies confirms the election.

**Priest Nominees to GBEC, with Pastoral Cures or in Specialized Ministries**

There are three (3) available positions, for six-year terms. The House of Bishops elects these members; the House of Deputies confirms the election.

**Nominees to GBEC, Members of Accredited Seminary Faculties or other Educational Institutions**

There are three (3) available positions, for six-year terms. The House of Bishops elects these members; the House of Deputies confirms the election.

**Ms. Liza Anderson**

New Haven, CT  
 Christ Church, New Haven  
 Diocese of Connecticut, Province I



I am a PhD candidate at Yale University with training in ancient and medieval church history, world Christianity, and ecumenism. I have taught theology in a variety of contexts, including denominational seminaries, ecumenical divinity schools, and distance learning programs. I bring a global perspective, having worked, studied, and traveled in more than 80 countries, and having studied 17 different languages. I have particular experience teaching and evaluating students whose first language is not English, and designing exams that are culturally sensitive to those coming from many different backgrounds. At this time in our Church's life, when there are many alternative ways of preparing for ordination, I believe there is a real need for some kind of standardized measure of competency. I am also, however, sympathetic to criticisms that have been raised about the General Ordination Examination, and I am open to re-imagining the exam to better suit the needs of the Church today.

**The Very Rev. Canon Michael A. Bamberger**

Sierra Madre, CA  
 Sierra Madre Episcopal Church of the Ascension  
 Diocese of Los Angeles, Province VIII



I remember a time when diocesan canonical exams were used as a tool for exclusion and discrimination. I am committed to the use of the General Ordination Examination as one tool for the Church to use to assess proficiency in a "blind" and consistent manner. That said, I am aware of the need for improving the process and quality of the evaluations. I believe that there are opportunities to make the process even more cost-efficient. I also bring the perspective of serving in a very diverse diocese, and of the need for the GOE to reflect the needs of the Church decades into the future. Another area in which the General Board of Examining Chaplains could be of help to the Church is in developing a national and consistent evaluation for determining proficiency for diaconal candidates. I will also bring years of experience as a pastor and teacher to the creation of each year's examination.

**The Rt. Rev. Larry Benfield**

Little Rock, AR  
 Diocese of Arkansas, Province VII



Since my appointment to the General Board of Examining Chaplains in 2007, I have focused on making the General Ordination Examination a better instrument for evaluating the academic proficiency of people who are preparing for a priestly vocation. Having a useful GOE is even more important as the church begins to train people for priesthood in settings other than seminary. I have also tried to find ways to

reduce the overall expense of the GBEC. We are now using new methods of evaluating the GOE that have reduced costs. I would like to see both of these efforts — a better examination and increased efficiency — through to their completion.

**The Rev. Canon Dr. Katharine C. Black**

Boston, MA  
 St. John the Evangelist, Boston  
 Diocese of Massachusetts, Province I



I claim active listening and posing apposite questions as skills. Often, wide-ranging discussions elicit various viewpoints, while the General Board also needs to create useful exams. Constructing good questions and responses helps improve that process. The Board’s chaplains intentionally have diverse backgrounds, but they also must produce questions, responses, and procedures for the General Ordination Examinations. Recently, with Field Education Students and seminarians, I’ve heard comments about which questions make sense, given the restricted resources permitted. In an increasingly diverse Cathedral Adult Forum, I also hear more of what participants want to learn, know, and discover. Newcomers want to learn about the Bible and how we read it, and they want to hear what we believe about Jesus Christ. Those of us charged with the formation of new priests must assure them, ourselves, and others that training priests requires the GOEs’ materials of learning and knowledge in addition to pastoral care and feelings.

**The Rev. Dr. Thomas Ferguson**

Columbus, OH  
 All Saints, New Albany, OH  
 Diocese of Southern Ohio, Province V



At its core, The Episcopal Church has a competency-based process for preparation for ordination: no degree or particular course of study is mandated canonically, and candidates are expected to demonstrate competency in seven areas, as defined by the Church as a whole. I believe that theological education and training for ministry are changing as the Church and the world are changing: it will be more experiential and collaborative to meet the missional needs of an increasingly post-Christian society. As Dean at Bexley Hall Seabury Western, I have worked to adapt our programs to be more flexible and responsive to the needs of the Church and the world. I feel that the General Board of Examining Chaplains is well poised to adapt and reshape the General Ordination Examination to meet the needs of the Church in helping future leaders demonstrate competency for ministry in the Church of the 21st century.

**Ms. Norma N. Givens**

Greer, SC  
 St. Luke’s Episcopal Church  
 Diocese of Atlanta, Province IV



Juxtapose the qualifications of the General Board of Examining Chaplains and my credentials and experiences, and you will find a perfect blend. I have been involved in the selection of leaders for the Church and learning institutions. As senior warden, I served as chair and liaison between the parish and bishop in selecting two vicars. I am a member of the Commission on Ministry, Diocese of Atlanta. I was elected lay deputy to the 77th and 78th Conventions; thus, I have been involved in the governance of our Church at all levels. During my tenure in higher education, I served on a presidential and other search committees (chair) for faculty and administrative positions. These activities usually required reading or accessing portfolios and interviewing candidates. I taught Human Resource Management, served as

interim HR manager, and chaired the Peach County Board of Education. I have a doctorate from the University of Georgia and completed further study at the University of Chicago. I love Jesus!

**The Rt. Rev. William Gregg**

Charlotte, NC  
Diocese of North Carolina, Province IV



Throughout my ministry as deacon, priest, and bishop, I have been committed to and involved in education, formation, and training with God's people to equip us to live faithfully our baptismal vows. My work has included the parish, diocese, and classroom (elementary and collegiate). As bishop of Eastern Oregon, I designed and implemented a program for preparation for ordained ministry (opened to all in the Diocese). I have broad experience in the design and evaluation of academic and field work. I think the General Ordination Examination is a useful tool. Both candidates and our Church need an excellent, reliable instrument for evaluating the level of general preparation and readiness of ordinals to begin ordained ministry. I served on the General Board of Examining Chaplains during 2006-12. I would like to serve again.

**The Rev. Charles E. N. Hoffacker**

Brandywine, MD  
St. Paul's Parish, Baden  
Diocese of Washington, Province III



I have been a General Ordination Examination reader for over a decade and served as a diocesan examining chaplain for nine years and as an Education for Ministry mentor for four years. In addition, I taught college Philosophy and World Religions. My interest is substantial in every canonical area, especially church history, liturgy, and theology. I have intense concentration, strong writing, and analytical skills; and I work well as both a team member and a leader.

In my view, the increasing diversity of programs that prepare candidates for ordination in The Episcopal Church requires us to articulate what are the essential learnings (both knowledge and skills) for deacons and priests. The process of doing so must take full account of the vocational diaconate and those deacons and priests ordained for baptismal ministry support teams. I believe that my competencies and skills would enable me to contribute to this church-wide conversation through service on the General Board of Examining Chaplains.

**The Rev. Adam Paul Kradel**

Media, PA  
Christ Episcopal Church  
Diocese of Pennsylvania, Province III



I have served as a reader for General Ordination Examinations twice. I am a parish priest. After serving a curacy, I returned to school to earn a doctorate in a rigorous political science program (University of Wisconsin-Madison). I will use my experience as a rector, combined with deep knowledge of human social behavior, to help craft relevant and engaging questions for the GOEs. My doctorate, in Political Science, examined how the American presidents use religious language to plant pictures in the minds of those listening to their nationally televised addresses. I will my knowledge of church and society and on-the-ground parish leadership to serve the General Board of Examining Chaplains.

**Ms. Anne LeVeque**

Takoma Park, MD  
 Church of the Ascension, Sligo Parish, Silver Spring  
 Diocese of Washington, Province III



I am a lifelong Episcopalian, and I have a great affection for the Church. I feel strongly that our clergy must be well-educated, whether in a traditional sense or through less traditional means. The General Ordination Exam provides a tool for evaluation and discernment of all candidates, whether in seminary, transitioning from another tradition, or ‘reading for orders.’ I feel that it is paramount that this tool be one that is effective, fair, consistent, and supportive of ministry. I have been a GOE reader for approximately 15 years. In recent years, my reading partner and I have introduced several streamlining innovations to the reading process, resulting in a swifter reading process that is also consistent. I have a broad academic background, with a master’s degree in liberal arts as well as one in library and information science. Currently, I am self-employed.

**The Rev. Canon Dr. N. Martin**

Seattle, WA  
 Saint Mark's Cathedral  
 Diocese of Olympia, Province VIII



Being a priest for 13 years in parishes ranging from family to corporate size (as well as a university chaplaincy) has helped me understand the academic dimensions and theological necessity of the presbyterate. Serving on two diocesan Boards of Examining Chaplains for a total of 11 years has further acquainted and familiarized me with many of the expectations, delights, and rigors of the General Ordination Examination. Articulating my broad and expansive knowledge of The Episcopal Church in a concise, clear, and effective way in many arenas — from sermon writing, teaching (parish, college, and community), appearing on an ecumenical cable TV show, and being Standing Committee President — have further prepared me for work on this Committee. As a firm supporter of the GOE as one important means for assessing competency for ordination to the priesthood, I would be honored to be a member of the national BEC and would bring my love of Christ, The Episcopal Church, and learning with me!

**The Rev. Dr. Simeon E. Newbold, Sr.**

Miami, Florida  
 Saint Kevin’s Episcopal Church  
 Diocese of Southeast Florida, Province IV



I have served four dissimilar congregations as a pastor or priest in my nearly 25 years in the ordained ministry. I have served on various commissions and committees in the local diocese, including the Commission on Ministry. I have also served as the elected clergy representative at Provincial Synod (Diocese of Virginia, Province III) and as a college professor and lecturer at six colleges and universities in the areas of Theology, Church History, and History of Religions. I have four earned college degrees, including a doctorate. With the above in view, if elected, my varied and relevant experiences and gifts could serve well the objectives of this body. However, I am always open to learning from others as well as to sharing my particular experiences and gifts.

**The Rev. Dr. Hugh R. Page, Jr.**

Mishawaka, IN  
Diocese of Northern Indiana, Province V



As a scholar, academic administrator, and cleric, I have been involved for more than three decades in a ministry that blends research, teaching, oversight, and ecclesiastical service. As the landscape of theological education has undergone major topographical changes — e.g., funding, curriculum — I have noticed how such transformations impact seminarians, clergy seeking continuing education opportunities, faculty, and seminaries. I have also noted areas of disjunction between the foundational training clergy receive and the realities they confront in their cures, most of which require a combination of nuanced theological reflection and crisis-management ability to manage effectively. The General Ordination Exam (GOE) presents an important evaluative moment, both discursive and analytical, in which readiness for such work is determined. My dual citizenship in the academy and the parochial world have taught me some interesting lessons about education for ministry and its assessment that I look forward to sharing if elected.

**Duane Andre Smith**

Berea, KY  
St. Hubert's Episcopal Church  
Diocese of Lexington, Province IV



I am a bi-vocational priest who serves full time as a professor of religion at Berea College (KY) and part time as rector of St. Hubert's Episcopal Church in the Diocese of Lexington. I have served as a clergyperson for about 20 years and know firsthand the issues of theology, worship direction, and leadership in the Church. I have recently served on the Leadership Team in the Diocese of Lexington, KY, the purpose of which was to facilitate churches' discussing issues openly and honestly about their parish life. I have also been a professor of religion at Berea College for 20 years. In this capacity, I have written and graded many exams and am sensitive to the variety of ways that students can express their ideas and convictions.

**Ms. Kristine T. Utterback**

Laramie, WY  
St. Matthew's Cathedral  
Diocese of Wyoming, Province IX



As an associate professor of Religious Studies who teaches Christianity courses at the University of Wyoming, I have brought a unique perspective to the General Board of Examining Chaplains that I would like to continue to contribute in another term. I am a layperson who teaches religion courses in a state university in the rural West, an area with some different issues from those found elsewhere. Over the last decade, I have developed skills in pedagogy and an increasing belief in the importance of theological education, particularly in encouraging a highly educated clergy; and in the importance of assessing the competence of those aspiring to ordination uniformly. I have served the GBEC as needed, but my training in medieval studies and my current teaching in all areas of Christian history, along with my two degrees in music, make those two aspects of the canonical areas of special interest to me.

## Trustees of the General Theological Seminary

**Number to be elected:** 2 lay persons by the House of Deputies; 2 presbyters or deacons by the House of Deputies; 2 bishops by the House of Bishops.

### Position Description

Trustees are responsible for evaluation, planning, implementation, and financial oversight of the Seminary for the fulfilling of its mission: “The General Theological Seminary is an Episcopal institution called to educate and form leaders for the church in a changing world.” Specific duties include constituting professorships, electing the Dean and members of the faculty, prescribing the course of study, and establishing rules and regulations for the government of the Seminary.

### Competencies & Qualities

Knowledge of the doctrine, discipline and ethos of The Episcopal Church; the ability to think creatively, reflect theologically, accept ambiguity, and work in the midst of change; and have demonstrated interest in and knowledge of theological education in the context of preparation for ministry, both ordained and lay, for The Episcopal Church. Nominees should also have an interest in The General Theological Seminary as a theological resource for Anglican studies that serves the whole Church, along with a willingness to commit time and talent, wisdom, wealth, and work for the Seminary’s well-being. In addition, it would be helpful if nominees had skills in finance and fund-raising (capital campaigns, planned giving, and annual fund-raising), and some connection to the financial base of the wider church and/or the New York area. It is vital that applicants have computer literacy and internet access.

### Duties of This Office

Trustees attend three meetings per year (February, May, and October) at GTS or in the New York City area for a total of 5-6 days per year. Members serve on committees that meet immediately before full board meetings or by conference call.

### Bishop GTS Trustee Nominees

There are two (2) available positions, for three-year terms. The House of Bishops elects these Trustees; the House of Deputies confirms this election.

### Lay Person GTS Trustee Nominees

There are two (2) available positions, for three-year terms. The House of Deputies elects these Trustees; the House of Bishops confirms this election.

### Clergy GTS Trustee Nominees

There are two (2) available positions, for three-year terms. The House of Deputies elects these Trustees; the House of Bishops confirms this election.

### The Rev. Yamily Bass-Choate

Yonkers, NY  
 San Andres’ and St. Paul’s  
 Diocese of New York, Province II



I owe my proactive leadership style and creative problem-solving to my passionate energy for mission. I am a member of the Trust Fund for Hispanic Theological Education, a General Theological Seminary Trustee. I serve on the Advisory Board for *The Episcopal New Yorker* and on the Community Advisory Committee for the City of Yonkers. Working across the table and communicating effectively with local and

international community and church leaders, I am guided by faith in the mission and evangelism of the Anglican Communion. As an urban priest, I am committed to carrying out God’s mission in the Church and the world with innovative programs to nurture and vitalize our community, especially when funding is low and fiscal responsibility is a priority. My strengths in the financial management of two parishes, dedication to collaborative administration and Church development, and a deep sense of God’s Grace are the gifts I will bring if elected.

**Ms. Anne Clarke Brown**

Plymouth, VT  
 Church of Our Saviour  
 Diocese of Vermont, Province I



All my ministries in The Episcopal Church — especially as General Convention deputy, General Ordination Exam reader, and congregational lay leader — are grounded in the theological education I received as a student in the master’s and doctoral programs at General. I was honored to be elected to the General Theological Seminary board in 2009 and 2012, and I have served during a difficult yet very exciting and forward-looking time in the Seminary’s history. GTS has successfully navigated “The Plan to Choose Life,” and it is embarking on exciting curriculum changes to meet the educational needs of the 21st-century Church. I bring to this position my prior experience on the Board and its Education and Formation Committee, training as a theological educator, experience as a church communicator and diocesan newspaper editor, passion for sound theological education for lay people, and commitment to diversity and a global mission context for educating lay and ordained ministers.

**The Very Rev. Dr. Susan Carter**

East Lansing, MI  
 St. John’s, Howell  
 Diocese of Michigan, Province V



As a priest and a professor, I understand the critical need for a sound theological education. I also grasp the challenges of being bi-vocational, a situation that many of our seminary graduates will face. I am committed to helping the General Theology Seminary administration and faculty offer the best preparation possible through leadership and fund-raising. My competencies and skills fit well, I believe, for service as a trustee of GTS. I have been an administrator, serving as secretary of the Board of Trustees of Michigan State University. Currently, I am a professor at MSU, and I have a deep understanding of higher education and faculty needs. I am rector of St. John's Howell and dean of the clericus. I have strong writing and presentation skills, and I hold a doctor of ministry in Preaching, a juris doctor, and a master of divinity from GTS. My faith leads my life.

**The Rev. Tommy Joe Dillon II**

Bainbridge Island, WA  
 Grace Church, Bainbridge Island  
 Diocese of Olympia, Province VIII



I am a graduate of two Episcopal seminaries (Berkeley Divinity School at Yale University and the General Theological Seminary), and I have worked closely with the Church Divinity School of the Pacific as Field Education Supervisor for several students. I have experience in creative fund-raising and capital campaigns in the two parishes and boards where I have served. With the mission to make our tradition relevant in a post-Christian era, I have networked and collaborated with a new generation of Church



leaders through the Gathering of Leaders, Gathering of the Next Generation, and the Wild Goose Festival. I face the future of the Church with confidence, faithfulness, and optimism, but also with a sense of reality and urgency, and I would be honored to serve as a trustee of our beloved Seminary.

**The Rt. Rev. Martin Scott Field**

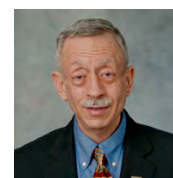
Kansas City, MO  
Diocese of West Missouri, Province VII



I am a highly intuitive and creative person, and I find my talents and my joys in ushering in systemic change and in finding and seizing the opportunities that are often hidden in stalemates and roadblocks and inflexible systems. If chosen, I would bring an outsider’s appraisal to the Seminary’s strategic thinking, and a healthy disloyalty to “the way it’s always been done.”

**Mr. E. Bruce Garner**

Atlanta, GA  
All Saints  
Diocese of Atlanta, Province IV



Experience has provided me with skills and competencies relevant to serving on the Board of Trustees of the General Theological Seminary. Serving on nonprofit boards for more than 30 years has provided me experience with change and transition, particularly in the governance arena. Serving on Executive Council, as a lay deputy to General Convention 2015, and as alternate or first alternate to GCs for 1994-2012 has provided me experience with the extensive changes that have occurred in our Church. Serving on my diocesan Executive Board, chairing the Consecration Committee for our bishop, and chairing our Commission on AIDS keeps me connected to the broad spectrum of God’s created humanity represented in it. My role in God’s mission in my parish fulfills and challenges me. My ability to ask difficult questions and to seek improved processes of working offers additional talents needed for service on the Board of Trustees. Meshing experience with flexibility helps me seek better ways to accomplish the work of both Board and Church.

**The Rev. Sarah (Sally) V. Johnston**

Columbia, SC  
St. Martin’s-in-the-Fields  
Upper South Carolina, Province IV



I am a 2004 graduate of the General Theological Seminary, where I served as president of the Community Council. Currently, I am rector of St. Martin’s-in-the-Fields in Columbia, SC. I also serve in various diocesan and community roles, and I have been a deputy to General Convention. My interest in the GTS Board of Trustees stems from both my deep appreciation of my formation there and from my pre-ordination experience in organizational improvement and change management in corporate banking and not-for-profit agencies. I hope I also represent the needs and gifts of “second-career clergy.” I am passionate about organizations being both efficient and kind, about taking stewardship seriously in both income and expense, and about inclusion and collaboration among sometimes conflicting interests to arrive at the next place God is leading us. I would be thrilled to make that journey with the board, faculty, staff, and students at GTS.

**Dr. Sandra D. Michael**

Binghamton, NY  
 Trinity Memorial, Binghamton, NY  
 Diocese of Central New York, Province II



Currently, I serve as SUNY Distinguished Service Professor, Binghamton University. I have considerable academic experience as department chair, graduate studies director, president of Faculty Senate, and recipient of federal research and curriculum grants. I have experience in academic mission and curriculum development, faculty and administrative recruitment and retention, university and system shared governance, conference organization, strategic planning, community outreach, alumni relations, institutional advancement, and regional accreditation. I believe my understanding of the traditional teaching, scholarship, and service expectations of faculty would help advance General Theological Seminary as a vibrant community of Christian learning. I further offer my background as an Education for Ministry graduate, cathedral chapter member, and diocesan-level discernment process member. I served as a deputy to General Convention for 2003-2015. I have been a member of the Executive Council Committee on Science, Technology, and Faith (ECCSTF); and convener of The Episcopal Church Network for ST&F. I am currently serving a second term on the General Board of Examining Chaplains. It would be my privilege to be of further service to the national Church as a trustee of GTS.

**The Rt. Rev. Steven A. Miller**

Milwaukee, WI  
 Diocese of Milwaukee, Province V



As a bishop of this Church since October 2003, I believe that strong and effective seminaries are vital to equipping God’s people for mission. General Seminary holds a particular place in my heart. As a 1984 graduate of GTS, I am committed to being a part of its future and want to continue to offer my gifts and time as member of the Board during this important season in its life. I have served on the Theology Committee of the House of Bishops, as co-chair of the Moravian-Episcopal Dialogue, and on the Standing Commission on Ecumenical and Interfaith Relations. I am currently vice chair of the Standing Committee on Liturgy and Music. In addition, I have experience in capital campaigns and in property development.

**The Rt. Rev. Allen Shin**

New York, NY  
 Diocese of New York, Province II



To the Board of Trustees of the General Theological Seminary, I bring my experience in theological education both as a student and as a teacher. Beyond the master of divinity, I have carried out further studies for STM at General and the post-graduate research at University of Oxford. I have also taught in Oxford and at Mercer School of Theology in the Diocese of Long Island. As a parish priest, I have learned to integrate the intellectual formation in higher education with the pastoral and spiritual formation in ministry. So, I bring to this position a wealth of experience and skills in, and a passion for, theological formation to equip new servants for ministry. It would be my privilege and delight to serve on this Board to enrich the conversation on the future of theological education for ministry and to envision a new life for General Seminary.

**Ms. Dianne Audrick Smith**

Oakland, CA  
St. Augustine's  
Diocese of California, Province VIII



For the past three years I had the privilege of focusing skills developed in marketing, business development and advancement, and educational administration with my avocation of volunteer efforts as a lifelong Episcopalian. An understanding of the need for collaboration, team building, vocational discernment, and the practicality of graduate education as director of enrollment services at Church Divinity School of the Pacific provided a unique opportunity to live into the challenges facing our Episcopal seminaries. I believe strongly that a collaborative approach to educational experience, whether with other seminaries or with other institutions of higher education, will further strengthen Seminary offerings. As a recently retired professional, I look forward to assisting General Theological Seminary in meeting its goals in collaborative education and diversity in programming and populations; and in identifying options for funding new and ongoing initiatives.

# JOINT STANDING COMMITTEE ON PLANNING AND ARRANGEMENTS

## Membership

The Rev. Canon Michael Barlowe, *Chair*, 2015  
Mr. N. Kurt Barnes, 2015  
The Rev. Deacon Nancy Crawford, 2015  
Ms. Shirley Greiman, 2015  
The Rt. Rev. Scott Hayashi, 2015  
Ms. Lori M. Ionntiu, 2015  
Ms. Sally Johnson, 2015  
The Rev. Canon Gray Lesesne, 2015  
The Rev. Libby Hunter, 2015  
The Rt. Rev. Kenneth L. Price, Jr., 2015  
The Honorable Byron Rushing, 2015  
The Rev. Dr. James Simons, 2015  
The Rt. Rev. Dean Wolfe, 2015  
The Rt. Rev. Wayne P. Wright, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*, 2015  
The Rev. Gay Clark Jennings, *Ex Officio*, 2015  
The Rev. Canon Chuck Robertson, *Invitee of Presiding Bishop*  
Ms. Anne Rudig, *Invitee of Presiding Bishop*  
Ms. Marian Conboy, *Staff*

### *Changes in Membership*

The Rev. Canon Mary June Nestler served until 2013, when she was replaced by The Rev. Libby Hunter.

## Summary of Work

**Mandate:** To arrange for the meeting of the next General Convention and to propose an agenda that the Convention may accept or reject, with or without amendments. The Committee also investigates sites for future meetings of the General Convention and makes recommendations to the General Convention.

**Meetings:** The full Committee held its first meeting in Salt Lake City, Utah on January 29-30, 2013. At the meeting, the 77th General Convention was reviewed, and there was an extensive discussion about ways to operate more efficiently. Some suggestions were made, including combining Secretariats, streamlining the legislation process, and switching to a virtual binder. A draft schedule for the 78th General Convention was developed, and criteria for identifying possible sites for future conventions were discussed.

The Committee's second and third meetings were convened via conference call on November 12 and 25, 2013. At these meetings, the Committee discussed GC resolution A003, which named four cities to be considered as potential sites for the 79th General Convention in 2018. The report of the cities under consideration for the convention in 2018, prepared by Lori Ionntiu, was discussed; and the Committee decided that Kansas City, Missouri; Charlotte, North Carolina; and Austin, Texas would be further considered and visited by the Executive Committee.

The Executive Committee traveled to Kansas City, Austin, and Charlotte January 6-9, 2014; and met with representatives of the Dioceses of Missouri, Texas, and North Carolina and with each city's convention bureau. A conference call of the Joint Standing Committee was convened on January 23, 2014, at which time

the Executive Committee gave its recommendation to select Austin, Texas, as the site of the 79th General Convention. This decision was ratified by the JSC on P&A and was forwarded to, and approved by, the Presiding Officers of the Houses of General Convention, Executive Council, and the Presidents of the Provinces.

A conference call was held on February 25, 2014 to restructure the draft schedule for 2015 and to start identifying sites for 2021. On September 30, 2014, the Committee met again by conference call and further discussed the draft schedule for 2015; began finalizing the list of sites for 2021 to recommend to General Convention; and discussed other requests and matters pertaining to the 2015 General Convention.

A conference call in October 2014, and additional work with subgroups of the Committee, determined final sites to be recommended for 2021, a time to honor Katharine Jefferts Schori, and a Eucharist to welcome the newly elected Presiding Bishop.

The final meeting of the triennium was a conference call in January 2015 to finalize recommendations to the 78th General Convention. The General Convention Manager gave an update on budget, volunteers, exhibits, housing, media and public safety; and the host diocese reported on final details of the Diocese of Utah event.

**PROPOSED RESOLUTIONS**

**A042: CONSIDER 80TH GENERAL CONVENTION SITES**

*Resolved*, the House of \_\_\_\_\_ concurring, That the following sites be considered for the 80th General Convention: Anaheim, California (Diocese of Los Angeles), Baltimore, Maryland (Diocese of Maryland), Louisville, Kentucky (Diocese of Kentucky), Minneapolis, Minnesota (Diocese of Minnesota), and St. Louis, Missouri (Diocese of Missouri).

**A043: SET GENERAL CONVENTION DAILY AGENDA**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention function through the following activities:

1. Formal legislative sessions of the two Houses;
2. Joint sessions for the presentation of the Presiding Bishop Nominees, Structure Conversation, and Proposed Budget, and a gathering for Mission Conversation, with time to honor the Presiding Bishop.
3. Meetings of the legislative committees of the two Houses; and
4. Open Hearings to be conducted, as needed, by all legislative committees; and be it further

*Resolved*, That the schedule and the daily timetable of the 78th General Convention held in Salt Lake City, Utah be:

Monday, June 22

11:00 am – 4:00 pm      Volunteer Supervisors and Secretariat Gathering

Tuesday, June 23

9:00 am – 5:00 pm      Registration and Deputy Certification

2:00 pm – 5:00 pm      Legislative Committee Officers and Legislative Aides Orientation

5:30 pm – 7:30 pm      Legislative Committees

Wednesday, June 24

7:00 am – 5:00 pm Deputy Certification  
 7:00 am – 8:30 am Legislative Committees  
 9:00 am – 9:45 am Presiding Bishop and President, House of Deputies Presentation  
 10:00 am – 12:00 pm Bishop and Deputy Orientation  
 1:30 pm – 4:30 pm Presentation of Presiding Bishop Nominees  
 7:00 pm – 9:00 pm Legislative Committees

Thursday, June 25

7:00 – 7:30 am Deputy Certification  
 8:00 – 9:00 am Legislative Session  
 9:30 – 10:45 am Opening Eucharist  
 11:45 am – 1:00 pm Legislative Committees  
 1:30 – 2:00 pm Deputy Certification  
 2:15 – 4:00 pm Legislative Committees  
 4:30 – 6:30 pm Legislative Session  
 7:30 – 9:00 pm Legislative Hearings

Friday, June 26

7:00 – 7:30 am Deputy Certification  
 7:30 – 9:00 am Legislative Committees  
 9:30 – 10:45 am Community Eucharist  
 11:15am – 1:00 pm Joint Session PB Nomination and Structure Conversation  
 1:30 – 2:00 pm Deputy Certification  
 2:15 – 4:00 pm Legislative Committees  
 4:30 – 6:30 pm Legislative Session  
 5:00 pm Resolution Filing Deadline  
 7:30 – 9:00 pm PB&F and Other Hearings

Saturday, June 27

7:00 – 7:30 am Deputy Certification  
 7:30 – 9:00 am Legislative Committees  
 9:30 – 10:45 am Community Eucharist  
 11:15 am – 1:00 pm PB Election/Legislative Session  
 1:30 – 2:00 pm Deputy Certification  
 2:15 – 6:15 pm Legislative Session  
 7:30 – 9:00 pm PB&F and Other Hearings

Sunday, June 28

10:00 am – 12:00 pm UTO Ingathering and Eucharist  
 1:30 – 2:00 pm Deputy Certification  
 2:15 – 6:15 pm Legislative Session  
 5:30 – 6:30 pm Provincial Caucuses  
 7:00 – 9:00 pm Suggested time for Provincial Gatherings

Monday, June 29

7:00 – 7:30 am	Deputy Certification
7:30 – 9:00 am	Legislative Committees
9:30 – 10:45 am	Community Eucharist
11:15am – 12:45 pm	Legislative Session
1:00 – 2:00 pm	Legislative Chairs Lunch
1:30 – 2:00 pm	Deputy Certification
2:15 – 6:15 pm	Legislative Session
6:30 – 8:00 pm	Bishop Gathering

Tuesday, June 30

7:00 – 7:30 am	Deputy Certification
7:30 – 9:00 am	Legislative Committees
9:30 – 10:45 am	Community Eucharist
11:15am – 1:00 pm	Mission Conversation
1:30 – 2:00 pm	Deputy Certification
2:15 – 7:30 pm	Legislative Session
7:45 – 10:00 pm	Suggested time for Seminary Gatherings

Wednesday, July 1

7:00 – 7:30 am	Deputy Certification
7:30 – 9:00 am	Legislative Committees
9:30 – 10:45 am	Community Eucharist
11:15 am – 1:00 pm	Legislative Session
1:30 – 2:00 pm	Deputy Certification
2:15 – 3:15 pm	Joint Session PB&F
3:45 – 6:15 pm	Legislative Session
7:00 – 8:30 pm	Reserved for Diocese of Utah Event

Thursday, July 2

7:00 – 7:30 am	Deputy Certification
7:30 – 9:00 am	Legislative Committees
9:30 – 10:45 am	Community Eucharist
11:15am – 1:00 pm	Legislative Session
1:30 – 2:00 pm	Deputy Certification
2:15 – 6:15 pm	Legislative Session
7:00 – 10:00 pm	Reserved for Legislative Session

Friday, July 3

7:00 – 7:30 am	Deputy Certification
8:30 – 10:00 am	Community Eucharist
10:30 – 1:30 pm	Legislative Session
1:30 – 2:00 pm	Deputy Certification
2:30 – 6:30 pm	Legislative Session
Joint Adjournment	<i>Sine Die</i>

## Budget

The Joint Standing Committee on Planning and Arrangements will hold two face-to-face meetings, and the Executive Committee will hold one face-to-face meeting during the next triennium. This will require \$10,000 for 2016, \$15,000 for 2017, and \$0 for 2018, for a total of \$25,000 for the triennium.



# JOINT STANDING COMMITTEE ON PROGRAM, BUDGET AND FINANCE

## Membership

The Rev. Canon Mally Ewing Lloyd, *Chair*, 2015  
The Rt. Rev. Stephen Lane, *Vice Chair*, 2015  
The Rev. Dr. Douglas Sparks, *Secretary*, 2015  
Mr. N. Kurt Barnes, *Treasurer*, 2015  
The Rt. Rev. Gladstone Adams III, 2015  
The Rt. Rev. David Álvarez, 2015  
The Rt. Rev. J. Scott Barker, 2015  
Ms. Jane Cislucyis, 2015  
The Rev. Patty Downing, 2015  
The Rev. Canon Cornelia Eaton, 2015  
The Rev. Canon Mike Ehmer, 2015  
The Rev. Canon John Floberg, 2015  
The Rt. Rev. Susan Goff, 2015  
Mr. Samuel Gould, 2015  
The Rev. Canon Victoria Heard, 2015  
The Rt. Rev. Edward Konieczny, 2015  
The Rev. Canon Frank Logue, 2015  
The Rt. Rev. James Mathes, 2015  
Ms. Barbara Miles, 2015  
Canon Charles (Chuck) Perfater, 2015  
Sr. Ing. Francisco Quiñones, 2015  
Mr. David Quittmeyer, 2015  
The Rev. Michele Racusin, 2015  
The Rt. Rev. Rayford Ray, 2015  
The Rev. Canon Jose Francisco Salazar, 2015  
Mr. Michael Spencer, 2015  
The Rt. Rev. Terry White, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*, 2015  
The Rev. Gay Clark Jennings, *Ex Officio*, 2015  
The Rev. Canon Dr. Michael Barlowe, *Secretary of General Convention*, 2015  
Mr. Steve Smith, *Representative of the House of Deputies*, 2015  
Ms. JoAnne Brockway, *Staff*  
Mrs. Nancy Caparulo, *Staff*  
Ms. Margareth Crosnier de Bellaistre, *Staff*  
Mr. Patrick Haizel, *Staff*

The Committee's membership is composed of three representatives from each province — two deputies and one bishop, appointed by the Presidents of the House of Deputies and the House of Bishops.

### *Changes in Membership*

Deputies William Coyne, Juan Rosario de la Cruz, Mark Harris, Noreen Duncan, Alan James, Ward Simpson, Jim Liggett and Frederica Thompsett were replaced by Deputies Sam Gould, Jose Francisco Salazar, Patty

Downing, Michael Spencer, John Floberg, Mike Ehmer, and Rosalie Simmonds Ballentine. Bishop Susan Goff replaced Bishop James Shand.

## Summary of Work

**Mandate:** The Canonical responsibilities of the Joint Standing Committee on Program, Budget, and Finance (PB&F) are found in Canon I.1.2(m) and Canon 1.4.6, and are to:

- recommend funding and spending policies to each General Convention for the succeeding triennium, i.e. mission (program) expense and budgets;
- present a balanced budget for The Episcopal Church in which income is equal to proposed expenditures each year; and
- to act in an advisory capacity to the officers of the General Convention and the Executive Council.

Other mandates are found in Rule II of the Joint Rules of Order, as found in the Constitution & Canons.

The Details and Commentary section of the 2013-2015 Budget of The Episcopal Church, adopted by General Convention on July 11, 2012, included the following:

*The current budget-planning process is complicated and takes place in a compressed timeframe. In addition, the shorter length of this General Convention required that we complete the budget within 36 hours of our final hearing. Many resolutions regarding funding have still to be considered by the Convention as we send this budget to press.*

*We wish to reiterate our desire for an ongoing budget process that takes place throughout the triennium and involves the Executive Council, the COO and staff of the Domestic and Foreign Missionary Society, and the Joint Standing Committee on Program, Budget, and Finance. We urge the Executive Council to commence this new process as soon as possible. We believe it will be especially important if a substantial reduction in the asking is contemplated for future budgets.*

## Meetings

From the outset of its work during the triennium, the Executive Council, particularly the members of the Joint Standing Committee on Finances for Mission (FFM) sought to address the concerns raised regarding process during the last triennium. To this end, they asked that at least one person from JSCP&F be present at each Executive Council Meeting and be included in the ongoing work of budget preparation directed by the Subcommittee on the Budget Process of FFM, chaired by Susan Snook.

Deputy Mally Lloyd was present at the Executive Council Meeting held February 25-27, 2013; Deputy Douglas Sparks was present at the Executive Council Meeting held October 15-17, 2013; Deputy Mally Lloyd was present at the Executive Council Meeting held February 5-8, 2014; Deputies Ehmer, Lloyd, Racusin, and Sparks, Bishop Lane, and PHOD representative Steve Smith were present throughout the Executive Council Meeting June 10-12; and Deputy Mike Ehmer was present at the Executive Council meeting October 24-27, 2014.

The FFM subcommittee adopted a framework and timeline for budget preparation in June 2013 that outlined a thorough process for preparation and input from the wider Church, which concluded in December 2014.

The Committee met face-to-face for the first time at the Maritime Institute in Linthicum Heights, Maryland on October 27-29, 2014. Prior to this meeting, the Committee had communicated via the extranet, and had nominated and elected the leadership of the Committee. Section chairs and members of sections had also been identified.

The major focus of the October meeting was the orientation of the members of the Committee, 19 of whom were new appointees. The meeting focused on tutorial presentations that outlined the various sections of the Five Marks of Mission budget adopted in July 2012: Corporate/ Canonical, Program, Funding, and Presentation. Representatives from staff and others presented historical information on the operation of the budget, what it contained, and what is required.

The Committee's work takes place primarily at the General Convention; however, the budget process calls for the draft budget from the Executive Council to be transmitted to the Committee no later than four months before the General Convention.

The Executive Council met January 9-11, 2015, at which time the draft budget was approved by Executive Council upon the recommendation of the Executive Council Joint Standing Committee on Finances for Mission. Deputy Mally Lloyd attended the Executive Council meeting on behalf of the Joint Standing Committee on Program, Budget and Finance. The draft budget was transmitted to PB&F in time for its meeting February 23-25, 2015, when the Committee was scheduled to meet for a second time.

Since the Committee received the draft document, it has continued to devote its time prior to the General Convention to reviewing and posing questions of a clarifying nature in learning more about the specific items contained in the budget, as well as to preparing a presentation on the draft budget for use at Provincial Gatherings in preparation for General Convention in Salt Lake in June 2015.

The General Convention Office, at the request of the Committee, provides the *draft* budget for The Episcopal Church to all deputies and bishops in a format that clearly demonstrates that it is a *work in progress*. Following the open hearings and resolutions from legislative committees at General Convention, final work on the budget will take place. The budget will be presented to a Joint Session of the Houses at 2:15 pm on Wednesday, July 1, with the vote to accept the proposed budget scheduled for the following day.

# STANDING COMMISSION FOR SMALL CONGREGATIONS

## Membership

Mr. George Wing, Colorado, *Chair*, 2015  
The Rev. Canon Katherine Harrigan, *Vice Chair*, 2015  
Mrs. Diana Moreland-Moyer, *Secretary*, 2015  
Ms. Jane Cislucyis, *Co-Secretary*, 2015  
The Rt. Rev. Dan Edwards, 2015  
The Rev. Margaret D'Anieri, 2015  
The Rev. Nancy S. McGrath Green, 2015  
The Rev. Brandon Maui (2012-2013)  
The Rt. Rev. Jacob W. Owensby, 2018  
Ms. Cindy Smith, 2018  
Mr. Jamal Smith, 2018  
Mr. James Steadman, 2018  
The Rt. Rev. John Tarrant, 2015  
Ms. Patrice Walters (2012-2013)  
The Most Rev. Katherine Jefferts-Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Dr. Kirk Hadaway, *Officer for Congregational Research*  
The Rev. Silvestre Romero, *Executive Council Liaison*  
The Rev. Cheryl Winter, *Representative of the PHoD* (2012-2013)

## Summary of Work

**Mandate:** To identify and recommend to General Convention policies, priorities, and opportunities to affirm and strengthen the health and development of small congregations.

**Meetings:** The Standing Commission for Small Congregations (SCSC) has met regularly during the 2012-2015 triennium. We have held three in-person meetings, including the Joint CCAB meeting, November 12-15, 2012, in St. Louis. Most meetings have been held virtually using telephone for voice conferencing and Adobe Connect for video conferencing. Adobe Connect allows us to share documents and videos without having to be together in person.

In 2011, the SCSC began using Adobe Connect for meetings, and this triennium the software has been the principal tool for bringing the members together. One of our members, Ms. Cindy Smith (San Joaquin), has been very effective as our Adobe Connect host. Mr. Brian Murray of the General Convention Office Staff has also been very helpful in training us in the use of Adobe Connect and in organizing our meetings. The SCSC wishes to recognize both Mr. Murray and Mr. Patrick Haizel of the General Convention Office staff for their help and support of our work during the triennium.

October 27, 2012, Teleconference

November 12, 2012 to November 15, 2012, Joint CCAB Meeting, St. Louis, Missouri January 23, 2013, Teleconference

February 22, 2013, Tele-Web Conference (Adobe Connect)

Presenters: The Rev. Canon John Floberg, North Dakota; The Rev Paul Sneve, South Dakota; Deacon The Rev. Terry Star, North Dakota; The Rt. Rev. John Tarrant, South Dakota – Native American Ministry

April 25, 2013, Tele-Web Conference (Adobe Connect)

Presenter: The Rt. Rev. Dan Edwards, Nevada -- Liturgy in Small Churches Guest: Ms. Ana Hernández, Dallas, Standing Commission on Liturgy and Music

June 27, 2013, Tele-Web Conference (Adobe Connect)

Presenter: The Rev. Canon Lou Blanchard, Colorado – Colorado’s Congregational Vitality Study

July 25, 2013, Tele-Web Conference (Adobe Connect)

Presenter: The Rev. Silvestre Romero, New Jersey -- 2015-2018 Budget Visioning

August 1, 2013, Subcommittee meeting, Teleconference

August 22, 2013, Tele-Web Conference (Adobe Connect)

Presenter: Ms. Julia Groom, President, Church Building Fund – Small Church Building Issues

September 17, 2013, Subcommittee meeting, Teleconference

September 26, 2013, Tele-Web Conference (Adobe Connect)

Presenters: The Rev. Canon Patricia Coller, Mr. Frank Armstrong, and Mr. Matthew Price, Church Pension Group – Small Church Pension and Medical Insurance Issues and GC2012 Resolution Do86

October 24, 2013, Tele-Web Conference (Adobe Connect)

Presenter: The Rev. Canon Katherine Harrigan, Central Pennsylvania – The Future of Small Church Ministries

February 27, 2014, Tele-Web Conference (Adobe Connect)

March 27, 2014, Tele-Web Conference (Adobe Connect)

Guests: The Rev. Canon Dr. Michael Barlowe and Mr. Brian Murray, General Convention Office

Presenter: The Rev. Canon Charles LaFond, Colorado – Stewardship Issues in Small Congregations

April 10, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

April 24, 2014, Tele-Web Conference, Adobe Connect

Presenter: Ms. Jane Cislucys (Northern Michigan) – Lay Ministries in Small Churches

May 22, 2014, Tele-Web Conference (Adobe Connect)

Continuing discussion of Lay Ministries and Licenses

June 12, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

June 26, 2014, Tele-Web Conference (Adobe Connect)

Presenter: Mr. James Steadman, Esq., Northwest Pennsylvania – Small Church Property-Use Issues

July 2, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

July 9, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

July 16, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

July 18, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

July 23, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

July 24, 2014, Subcommittee, Tele-Web Conference (Adobe Connect)

July 30, 2014 to August 2, 2014, Meeting, American Airlines Training & Conference Center, Fort Worth, Texas – Symposium on Formation for Small Church Leadership

Symposium Guests:

- The Rev. Canon Roberto Arciniega, Latino Missioner, Oregon
- The Rev. Patsy Barham, Texas, Little Church Club, Iona School for Ministry, Texas
- The Rev. Canon Dr. Michael Barlowe, Secretary of General Convention
- The Rev. Canon Lou Blanchard, Canon Missioner, Colorado
- Ms. Ellen Bruckner, Living Stones, Iowa
- The Very Rev. Ronald Byrd, Sr., Episcopal Church Foundation, Michigan
- The Rev. Dr. Thomas Ferguson, Dean of Bexley Hall, Bexley-Seabury
- The Rev. Dr. Andrew Grosso, Director of Distance Learning, Nashotah House
- Ms. Ana Hernández (Dallas, Standing Commission on Liturgy and Music)
- The Rev. Dr. Robert Honeychurch, Bloy House, Claremont School of Ministry, Los Angeles
- Dr. Lisa Kimball, Director of the Center for Ministry of Teaching, Virginia Theological Seminary
- The Rev. Dr. Elizabeth Magill, Episcopal Divinity School, New York
- Ms. Andrea McKeller, Standing Commission on Lifelong Christian Formation, South Carolina
- The Rev. Lori Modesitt, Director of Education, Wyoming
- Ms. Demi Prentiss, Ministry Developer, Fort Worth
- The Rt. Rev. Rayford Ray, Northern Michigan
- The Rev. Kay Rohde, Ministry Development Coordinator, Northern California
- The Rev. Holladay Sanderson, Living Stones, Idaho
- The Rev. Josh Shipman, Student, Seminary of the Southwest, Colorado
- The Rev. Dr. Susanna Singer, Church Divinity School of the Pacific, California
- The Rev. Dr. Sylvia Sweeney, Dean, Bloy House, Claremont School of Theology, Los Angeles
- Ms. Frances Thayer, Maryland
- Dr. Fredrica Harris Thompsett, Episcopal Divinity School, Executive Council, New York
- The Rev. Sam Todd, Dean, Iona School for Ministry, Texas
- The Rev. Chris Yaw, ChurchNext.org, Michigan

Guests from the Diocese of Fort Worth:

- Mr. Walt Cabe, St. Alban's Episcopal Church, Arlington, Texas
- Ms. Patti Callahan, St. Luke's Episcopal Church, Fort Worth, Texas
- Ms. Marti Fagley, St. Francis Episcopal Church, Willow Park, Texas
- Ms. Peggy Gagliardi, St. Stephen's Episcopal Church, Hurst, Texas
- Ms. Sheri Glaser, St. Luke's Episcopal Church, Fort Worth, Texas
- Mr. Jack Hardaway, St. Alban's Episcopal Church, Arlington, Texas
- Ms. Pam Hardaway, St. Alban's Episcopal Church, Arlington, Texas

- Ms. Jane Jolley, St. Stephen’s Episcopal Church, Hurst, Texas
- Ms. Kimberly Kingsbury, St. Luke’s Episcopal Church, Fort Worth, Texas
- Mr. Field Lange, St. Andrew’s Episcopal School, Fort Worth, Texas
- Mr. Theodore Lange, St. Andrew’s Episcopal School, Fort Worth, Texas
- Mr. David Lowder, St. Stephen’s Episcopal Church, Hurst, Texas
- Ms. Susan Lowder, St. Stephen’s Episcopal Church, Hurst, Texas
- Ms. Becky McKneely, St. Stephen’s Episcopal Church, Hurst, Texas
- Mr. Floyd McKeneely, St. Stephen’s Episcopal Church, Hurst, Texas
- Ms. Betsy Menikos, Christ the King Episcopal Church, Fort Worth, Texas
- The Rev. Sandra Michels, Christ the King Episcopal Church, Fort Worth, Texas
- The Rev. Tracie Middleton, St. Stephen’s Episcopal Church, Hurst, Texas
- Mr. Harold Parkey, Christ the King Episcopal Church, Hurst, Texas
- Mr. Bill Reisch, St. Stephen’s Episcopal Church, Hurst, Texas
- Mr. Michael Rivard, Christ the King Episcopal Church, Fort Worth, Texas
- Ms. Katie Sherrod, Executive Council, St. Luke’s Episcopal Church, Fort Worth, Texas
- Mr. Norm Snyder, Good Shepherd Episcopal Church, Granbury, Texas
- Mr. Brent Walker, St. Stephen’s Episcopal Church, Wichita Falls, Texas

August 28, 2014, Tele-Web Conference (Adobe Connect)

September 25, 2014, Tele-Web Conference (Adobe Connect)

October 21, 2014 to October 25, 2014, Meeting, Crowne Plaza Chicago-O’Hare, Illinois

November 6, 2014, Tele-Web Conference (Adobe Connect)

November 13, 2014, Tele-Web Conference (Adobe Connect)

November 19, 2014, Tele-Web Conference (Adobe Connect)

December 3, 2014, Tele-Web Conference (Adobe Connect)

December 9, 2014, Tele-Web Conference (Adobe Connect)

The Symposium on Formation for Small Church Leadership

The SCSC’s principal activity during the triennium was the Symposium on Formation for Small Church Leadership, which took place over the four-day period of July 30, 2014 to August 2, 2014 at the American Airlines Training & Conference Center in Fort Worth, Texas. The event was paid for from a \$43,000 grant from the Constable Fund. Without this grant, the event would not have been possible, as the triennial budget would not have been sufficient for the purpose.

We wish to acknowledge the support and assistance in planning and organizing this event that we received from Mr. Patrick Haizel and Mr. Brian Murray of the General Convention Office. Ms. Demi Prentiss of the Episcopal Diocese of Fort Worth (<http://episcopaldiocesefortworth.org>) and The Rev. Dr. Robert Honeychurch, Bloy House, the Claremont School of Theology (<http://www.bloyhouse.org>), Los Angeles, helped us to plan the event and make it happen. Many others helped in various ways to make the event a success. The SCSC recommends the AAT&CC facility to the Church as an excellent place for meetings. We were treated very well.

During the meeting, the SCSC met with representatives of several churches in the loyal Episcopal Diocese of Fort Worth. They shared with us the trials and struggles they went through in “reinventing church.” Many of

the churches of the Diocese were “seized” by the departing Diocese of Fort Worth, and those members who remained loyal to The Episcopal Church found themselves effectively ejected. These loyal Episcopalians were faced with locating places to assemble for worship, reorganizing their vestries, raising funds, recruiting clergy, etc. They told us how some clergy were called out of retirement to assist with services. Other clergy came from other dioceses to help, as the Episcopal Diocese of Fort Worth reorganized with the assistance of the Presiding Bishop and staff of The Episcopal Church.

During the Symposium, Dr. Kirk Hadaway, TEC Officer for Congregational Research, gave a talk about small church statistics. One of his statistical studies revealed that small congregations are the norm in The Episcopal Church. The median church has an Average Sunday Attendance (ASA) of 61, and 69 percent of all our churches have an ASA of 100 or fewer.

The Rev. Canon Lou Blanchard, Canon Missioner of the Diocese of Colorado, gave a presentation on small church characteristics, leadership development, and ministry training programs in the Diocese of Colorado. She shared the results of Colorado’s Congregational Vitality Study. The information developed has been used by in providing training for clergy and lay leaders of the many small congregations of the diocese through Colorado’s Church Development Institute.

The Rev. Chris Yaw, Michigan, spoke about online educational websites. He gave a demonstration of his website, ChurchNext, <http://www.churchnext.tv>.

Dr. Lisa Kimball, Virginia Theological Seminary, presented a short video regarding questions commonly asked of VTS’s Center for Ministry of Teaching.

The Rev. Robert Honeychurch, Los Angeles, moderated a panel discussion of online education and distance learning. The panel included representatives of five seminaries involved in using the internet for distance education.

The Symposium included an evening presentation for the SCSC and the Symposium Guests by the Diocese of Fort Worth about the struggles it has gone through in reorganizing. The presenters also shared the joy and benefits of reinventing church in the diocese. The presentation was followed by a Eucharist demonstrating “church in a box,” beginning with setting up a portable altar and ending with taking it down. The Rev. Sandra Michels, Christ the King Episcopal Church, Fort Worth, Texas, narrated and presided over the Eucharist. The Rev. (Deacon) Tracie Middleton, St. Stephen’s Episcopal Church, Hurst, Texas, served as the deacon during the Eucharist.

Much of the time of the Symposium was used for discussions of small church issues. The guests included ministry developers and persons involved in seminaries and diocesan schools. The SCSC members and the guests divided up into small groups to facilitate discussions of questions and issues concerning small churches. These conversations were immensely valuable to the SCSC. The SCSC regrets that the imperative need to engage in these discussions and conversations limited the time available for speakers and panels and limited the topics that could be presented at the Symposium.

### **Discussion and Conclusions**

Many small churches find it financially difficult to maintain full-time, seminary-trained clergy. As a result, small churches increasingly depend on part-time, retired, and bi-vocational clergy and on licensed lay leaders to keep services going. When clergy are unavailable, lay worship leaders lead Morning Prayer. Some Bishops have also authorized lay worship leaders to distribute previously consecrated sacraments during Sunday services. Without this authorization, the congregants in these churches would be denied regular access to the sacraments.



The traditional, three-year residential seminary model was developed as a way to train young adults, who would go directly from college to seminary. This model does not work well for persons who have families, jobs, and community involvement. Some traditional seminaries provide programs that allow remote studies and then require periods of time to be spent on campus. Over a period of time, students accumulate enough credits to graduate and be ordained as priests. This model is helpful, particularly where distances, seminary availability, and transportation may not permit easy access to the seminary campus.

Some dioceses have developed their own schools. The SCSC has not been able to explore or report on all of them. Diocesan schools may or may not grant academic degrees. Bloy House, Claremont School of Theology (<http://www.bloyhouse.org>) in the Diocese of Los Angeles has cooperative arrangements with accredited seminaries that allow their students to earn academic degrees that are granted by the cooperating seminary.

Four dioceses (Kansas, Missouri, Nebraska, and Western Kansas) sponsor the Bishop Kemper School for Ministry (<http://www.bishopkemperschool.org>) in Topeka, Kansas.

The Iona School for Ministry (<http://www.epicenter.org/iona-school-for-ministry>) in the Diocese of Texas trains students locally to work as bi-vocational, non-stipendiary priests and deacons. It brings students to Camp Allen for weekend programs. Upon ordination, the graduates serve small congregations without pay or for nominal pay only. According to The Rev. Sam Todd, Dean of the Iona School, Iona's students follow an academically rigorous program. When they complete their education, Iona's graduates take and pass the GOE's with marks similar to, or better than, graduates of traditional, residential seminaries.

The Diocese of Colorado sponsors the Anglican Studies Program (<http://www.iliff.edu/learn/the-iliff-experience/denominations/episcopal-church-anglican-studies>) at the Iliff School of Theology in Denver, Colorado. Much of the coursework is done via the internet. Videoconferencing is used to allow classes to meet virtually. The students file their work over the internet and engage in discussions by posting comments on each other's work. Some class meetings are held in person in Denver.

Central Pennsylvania's Stevenson School for Ministry (SSM) is a diocesan program that forms lay leaders, deacons, and priests. There is also a discernment component, "Exploring Your Ministry," which seeks to guide discerners in asking, "Who and what am I called to be and to do?" The discernment component is both an entry into the ordination process and an opportunity to explore lay ministry. A Lay Training Institute, T.H.R.I.V.E., focuses on formation for lay ministry. The SSM program has been developed as a hybrid program, which uses both in-person meetings and meetings and internet-based coursework using the Moodle platform. Students can converse, post work, and reply to both the instructor's and each other's work via the internet. The program is used both synchronously and asynchronously. In-person sessions take place either in daily sessions or on weekends. The Stevenson School for Ministry can be found on the diocesan website, <http://www.diocesecpa.org>.

Fourteen Dioceses (Alabama, Alaska, Arkansas, Eastern Michigan, Hawaii, Mississippi, Navajoland, North Dakota, Northwest Texas, Texas, The Rio Grande, West Texas, Oklahoma, Nebraska, South Dakota, and Wyoming) have joined together to form the Iona Initiative (<http://www.ionainitiative.org>), which takes the Iona School's model and uses its materials to train their non-traditional students.

In the Diocese of Wyoming, for example, students meet on weekends in Caspar, Wyoming to study together and watch taped lectures prepared by the Iona School's faculty, which provides local training of candidates for the diaconate and priesthood and training for the various licensed lay ministries.

In the Diocese of South Dakota, the Niobrara School for Ministry (<http://www.diocesed.org/ministries/niobrara-school-for-ministry>) provides local training of candidates for ordination and for licensed lay ministries. Several of these dioceses (Alaska, Montana, Navajoland, North Dakota, and South Dakota) are

involved in the Bishops' Native Collaborative (<http://www.bishopsnativecollaborative.com>), which is working to adapt the Iona School's model to the needs of native communities.

In Canada, the Indigenous Studies Centre at the Vancouver School for Theology (<http://vst.edu/#vst>), Vancouver, BC, provides local training and education for Canada's Indigenous population. Some TEC dioceses have had students in the Vancouver program. The Vancouver model sends tapes and written materials to the students, who study locally with mentors. Students then spend part of their summers studying in community on the Vancouver campus.

The effect of the internet is to make distributed education widely available. Coursera (<http://www.coursera.org>) and the Khan Academy (<http://www.khanacademy.org>) are leaders in the secular world. Their students can download lectures and participate interactively as in webinars. Users of Coursera and the Khan Academy come from all over the world, wherever internet access is available. Some universities have started to use this model. Coursera presents high-quality classes on various subjects from colleges and universities around the world. This model is disrupting higher education, and it may threaten the financial viability of some "bricks and mortar" institutions. They are faced with adapting or closing.

Seabury Western Theological Seminary saw the future of higher education as increasingly virtual. It sold its campus and merged its operations with another seminary, Bexley Hall. Bexley-Seabury (<http://www.bexleyseabury.edu>) is committed to making courses available over the internet. Virginia Theological School (<http://www.vts.edu>) has extensive resources that can be accessed over the internet.

Other seminaries have varying levels of involvement with the internet. The Church Divinity School of the Pacific (<http://www.cdsp.edu/>) offers courses online. The Episcopal Divinity School (<http://www.eds.edu/distributivelearningoption>) has a distributive learning option for non-traditional students). Nashotah House (<http://www.nashotah.edu/>) has a distance-learning option. Sewanee's Education for Ministry (<http://efm.sewanee.edu/efm-online/about-efm-online>) program has an online component. There are others that the SCSC has not located or reviewed.

Seminary materials available over the internet are primarily intended for the use of the seminaries' own students, but some also offer continuing education for clergy and courses for laity. The ability of the seminaries to commit to making educational courses and resources is constrained, however, by their financial realities. As "bricks and mortar" institutions, they have to find ways to pay their expenses, which means that they have limits on their abilities to provide their offerings free or at low cost to the public.

Many dioceses have also developed training programs for both clergy and lay leaders of congregations. A number of dioceses participate in Church Development Institute programs providing training for clergy and lay leaders of congregations, and others are planning to start CDI programs in 2015. Dioceses that hold or have held CDI programs include Atlanta, Colorado, Eastern Michigan, Georgia, Long Island, Milwaukee, Northern Indiana, Rochester, Southwest Florida, Southwest Virginia, Utah, Western Michigan, and Washington. Colorado's CDI program was recently extended to include joint programs with Utah and the Rocky Mountain Synod. Parts of Colorado's CDI programs have been specifically tailored to the development needs of its small churches.

Making quality lay education and training widely available continues to be an imperative need that The Episcopal Church must address. The modern way that this can happen is for seminaries and schools to make programs available to the public, either on institutions' own websites or on other sites following the Coursera model.

ChurchNext (<http://www.churchnext.tv>) is a very interesting website developed by The Rev. Chris Yaw, Michigan. Similar to the Coursera model, it presents courses by established teachers and theologians.

ChurchNext initially started out to meet a need in the Diocese of Michigan to provide and share adult-education programs, which could be viewed and discussed during adult Sunday Schools. ChurchNext has since developed into a forum where individuals, churches, and dioceses can pay a small fee for access to a broad range of church-related courses and programs.

Churches and dioceses can also use ChurchNext's site to support their own educational sites, either on their own websites or as a sub-site on ChurchNext's website. Many of the programs are specifically oriented to The Episcopal Church. The site has much potential to grow and to become very useful as an educational forum for The Episcopal Church. Some materials on the site are free; others are offered at a nominal cost to subscribers. The SCSC recommends this site to General Convention as worthy of a visit.

With access to the internet, even the smallest churches can put their information out to the public at a minimal cost. Clergy and laity can access educational and training programs from anywhere in the world, however remote, as long as a connection is available. The connection may be only a "hot spot" accessed through a smartphone on the North Slope in Alaska, a reservation in Arizona or the Dakotas, or in a village in Haiti or Ecuador Central, but it is access. The effect is to provide small congregations in remote, rural areas access to tools and information that were previously available only for much larger, English-language congregations in metropolitan areas.

A central listing of all programs available over the internet is needed. The Episcopal Church Library (<http://www.episcopalchurch.org/library>) is the closest resource the SCSC found to such a listing. Some members of the SCSC have commented that The Episcopal Church Library is hard to find, difficult to use, and not well-maintained. Using a Google search engine could improve the site. Well-maintained links, easy access, and a good search engine are essential elements of a central resource site.

There is no easy way to locate or distribute all the information and program materials that have already been created. Throughout The Episcopal Church, the lack of easy access to information has contributed to duplication of effort as the wheel is reinvented. As connectivity increases over the internet more and more, the need for access to existing and future educational resources likewise increases. Available information should include links to materials in all the languages in use in The Episcopal Church. Providing such access is a matter of equality and social justice.

### **Children, Youth, and Young Adults in Small Congregations**

In small churches, there is often a two-sided coin regarding children, youth, and young adults. Their numbers tend to be small. It is often a challenge to organize youth groups or Sunday School classes for the small number of children who may show up on a given Sunday, or to have a viable community of young adults. At times, this small number may discourage single young adults, young couples, and families with children from attending smaller churches. It can even discourage volunteers from putting time into the programming for these groups.

The other side of this coin is that there are often more opportunities for people in these age groups to be involved. Youth often serve as acolytes, but they may also be encouraged to be readers, ushers, or members of the choir; and to participate in a wide variety of ways in liturgy. Sometimes a small Sunday school class can even give children and youth more one-on-one time with leaders, which the children may not receive in their daily lives. This can serve to strengthen their Christian faith in unseen and amazing ways. In addition, there are opportunities for youth and young adults to take on leadership roles, serve on vestries, and participate as delegates to diocesan conventions.

Small churches often provide youth greater opportunities for intergenerational and ecumenical interaction. This can lead to valuable and vital mentoring relationships. Smaller churches also find that provincial or diocesan youth events, such as EYE, can expand the youth ministry of the small church.

What attracts children, youth, and young adults is not only the internal, “inside the walls” ministries — worship, preaching, coffee hour — but also the external, “outside the walls” ministries — outreach, feeding programs, and working ecumenically. Friendships developed in youth programs can span school boundaries and lead to lifelong relationships. Small, close-knit congregations have a unique advantage in fostering close relationships with youth, setting the stage for them to become active adult participants.

When adults find worship to be life-giving and spiritually fulfilling, it can transfer to children, youth, and young adults. What is important is being a good example of Christ in the community. When the church community is seen as active and engaged, children, youth, and young adults will want to participate more fully in its life.

### **Ecumenism and Small Churches**

Thoughtful Christians have wondered about Jesus' intention when he told the Parable of the Talents (Matthew 25.14-30). The Master delighted in the five- and two-talent slaves who doubled their talents and who, as a result, were welcomed into the Master's joy. But the one-talent slave, who had something to share but was fearful of risking it, buried the talent, returned it in its entirety, and as a result, was heavily rebuked.

The Master's rebuke seems to be centered on the problem of fear. Jesus' point seems to be that the disciples, having received the teaching and mission of Jesus, were not to be fearful of the road ahead, even though they might feel small before the challenge of the early Gospel mission. This parable has implications for small church congregations.

Statistics quoted in this *Blue Book* report tell us that small congregations are the predominant model of congregational life in The Episcopal Church, and that they are here to stay. Many have vibrant ministries, doing the work God has given them to do. While their size may be small, they are fearless, as Jesus would have them be; and they bloom where they are planted, confident they are making a difference.

But what happens when, due to death or a physical moving away to a new location, small congregations become smaller, and these vibrant ministries are imperiled because fewer shoulders try to carry the same weight in ministry? Exhaustion? Burn-out? Onslaught of fear?

Every effort should be made to help small congregations come together for fruitful ministry, both within Called to Common Mission and beyond it. Some of our congregations have envisioned new ways to be effective and have joined hands with other denominations to serve together as a richer Christian family. Jesus would have approved of that unity.

In the Diocese of Eastern Oregon, 5 congregations out of 23 have ecumenical partnerships that serve their communities faithfully and broaden Christian presence. In one congregation, half of its members come from Episcopal and Lutheran (ELCA) Churches, while the other half is composed of many other denominations — Christians serving their neighbors, learning from their different traditions, and eating together at the Lord's table. Is this a new idea? Not so much. This congregation has served its community, particularly the lower-income area to its south, for more than 15 years.

New models are working, and small congregations have roles in this ongoing Kingdom of God. It is time for our Episcopal Church to offer wider affirmation and support for ecumenical ministry in which small congregations have an honorable place in God's economy and, in combination with others, remain fearless of their future.

## **Parochial Report — New Ways of Measurement Needed**

The Parochial Report has served to examine the life of The Episcopal Church over the years — a life that in the recent past has been declining in numbers of members. As the wider Church has diminished in size, its Parochial Report has not changed in tone or content. It remains a document of numbers of members, confirmations, deaths, transfers, receptions, services, and dollars budgeted.

As the number of small congregations has grown to be the prevalent model in The Episcopal Church, the Parochial Report gives no space to speak of the life-giving ministries that many of these vibrant small congregations are offering. These ministries often are the life-blood for themselves and for their community. It is holy work that should be noted. Instead, what their Parochial Reports show are smaller numbers of members and fewer dollars, which imply a diminution of their ministries. They do not capture the growth in depth of faith, breadth of mission, or the vital presence in small towns of a tradition that really does welcome everyone. It is not the total picture by any means.

“Membership” is still reflective of the days when one joined an Episcopal Church by being baptized, confirmed, or transferred. Yet more and more, we have those who want to stay on the fringes, who attend more than one church, who connect via social media, and so on. Ministry is happening but doesn’t show up in the numbers.

Moreover, ecumenical congregations struggle to make sense of the questions asked. The best they can do is note the number of Episcopal members and dollars in contrast to the number of “others” who may be a far larger group. As a result, the data reported do not accurately reflect the reality of the congregation. The Parochial Report gives no space, or seeming importance, to the holy work done in the community and the world by those who intentionally are “one in Christ.”

While we recognize the desire to have longitudinal data sources that depict financial and membership trends, we suggest giving some thought to what the real value is of the trends being measured. Intended or not, the effect is often that small congregations can become discouraged because their numbers are getting smaller, regardless of the ministries and formation that is happening. We suggest that the Church give some thought and consideration to what we really need to know in this “new age” of the Church, and then to develop ways to measure it.

## **Real-Property Issues**

Small congregations are the norm in The Episcopal Church, with the median church having an Average Sunday Attendance (ASA) of 61, and with 69 percent of all our churches having an ASA of 100 or fewer.

Some congregations have always been small. Others, particularly in the industrial heartland, were at one time much larger. Many of these churches, which were constructed during an earlier era, are architecturally and historically significant structures that were built to accommodate large congregations with multiple programs. The Episcopalians were at the top of the social order, and their churches reflected that stature.

Today, churches with aging congregations and dwindling numbers find their energies focused on maintaining a building that they do not need and cannot use to its fullest capacity. The financial and human resources needed to keep such buildings going hinder congregations from being able to engage in outreach or to make a real difference in their communities. It is difficult to attract new congregants to these churches when their worship space is so oversized compared with the worshiping congregation, when the outward face of the building seems more like a fortress than a place of joy, and when every new face is seen as a volunteer to keep the bills paid and the building in repair.

The Episcopal Church Building Fund has offered some innovative ideas to these congregations through its Recasting Assets program. These ideas encourage congregations to think outside the box in reimagining the use of buildings to reach the people of God. We know that the Church is the people, not the building. But we also know that the building is, in many cases, what binds our people together, and in many cases, what is preventing our people from stepping forward in faith.

Some congregations have even found it beneficial to leave their buildings — renting them out to other denominations, letting the rental income cover costs, and perhaps using only some office space in the building, but renting alternate worship space. While it may seem a radical idea at first, many displaced congregations in dioceses where strife and litigation over church property continues have found it liberating to be free of the building — empowering the congregations to engage in outreach and forcing (or enabling) them to engage in the world outside the buildings that otherwise might be holding them back.

Alternate uses of our buildings are often possible and appropriate, but churches considering alternate uses must also consider the potential legal effect of changing a building's use. Such actions will certainly affect potential tax exemptions. They may violate provisions of bequests or trusts, may result in scrutiny by the IRS, and may invite the imposition of federal, state, and local codes and regulations regarding the building accessibility, whereas continued use solely for religious purposes very often is exempt from those very same codes and regulations.

### **Reorganized Dioceses**

As members of The Episcopal Church join in conversation about "doing church a new way," we encourage other dioceses to look to those dioceses that have faced the challenges of schism and reorganization. The efforts of the Dioceses of San Joaquin and Fort Worth were examined as they continue their work toward sustainability. As schism occurred, those remaining Episcopalians were faced with radical changes. Displaced from buildings and properties, they were faced with reduced availability of clergy and drastically decreased remaining congregation sizes that resulted in very limited funds available to address these issues. Even with all these challenges, people of these revived dioceses looked forward with great hope and anticipation to their amazing opportunity. In many locations, it was a new understanding of their call to mission. It became an opportunity to direct more resources and finances to ministry, outreach, and education rather than to facilities and their upkeep.

In the Diocese of San Joaquin, the proposed path to sustainability is through the regional Ministry Hub concept, where collaborative, extended faith communities are formed around large, stable parishes. Mission support becomes more robust as it provides the local regional hubs that provide the people-to-people relationships and collaboration needed to foster the smaller faith communities, stimulating their growth into self-sustaining congregations.

Faith communities both large and small benefit from a multiple staffing concept — both lay and clergy — within the mission hub. Resources are no longer fragmented by supporting many isolated faith communities that need more support than can be provided by a central diocesan office. A modern communications infrastructure and conferencing center is planned in each of the far-flung regional Ministry Hubs to enhance participation in governance meetings, and formation and education presentations. Returning properties are evaluated through the lens of the Ministry Hub-vision of the reorganized diocese. Those in poor repair or that are poorly suited to the new vision may be sold with proceeds used to support the continued rebirth of the diocese.

Episcopalians in both dioceses spoke of moments of profound realization after the initial shock and struggles of being displaced had passed. For some, being without a building allowed them a refocusing of purpose and reallocation of limited funds toward outreach and ministry, instead of property ownership with the

accompanying responsibilities of maintenance and upkeep. In the Book of Acts, although private ownership is acknowledged, shared ownership is encouraged. (Acts 4:32-37). In the early Church, the emphasis was on *ekklesia* — the gathering, the assembly, the congregation of the faithful who came together to share in the sacrament. It is with this understanding that a theological perspective on building ownership and stewardship might be influential. The early apostles shared what they had in common for the benefit of the whole community. The questions we ask are whether property ownership may be detrimental to the community, and how we can best be good stewards of our resources. Others in the reorganized dioceses experienced the shared benefit and grace of worshipping with newfound ecumenical partners or sharing ecumenical spaces.

The Episcopal Church as a whole may not be as blessed with the near-disaster “opportunities” that prompted the reorganized Episcopal Dioceses of San Joaquin or Fort Worth to seek and claim a new vision. What is explored in those places may be very appropriate as a model for many dioceses within The Episcopal Church: it is a more efficient model, it focuses limited resources on mission, and it ultimately can be a more realistic model for evangelism and formation.

### **Resolutions from GC2012**

The SCSC was tasked with reviewing Resolution Do86: Explore Pension and Medicare Supplemental Health Benefits for Retired Non-Stipendiary Clergy, which reads:

*Resolved*, the House of \_\_\_\_\_ concurring, That the 77th General Convention of The Episcopal Church direct the Standing Commission on Small Congregations and the Office of Congregational Vitality in consultation with the Church Pension Fund, the Church Medical Trust, and the “Bishops of Small Dioceses” to explore and develop plans by which retired non-stipendiary clergy serving small congregations may receive Medicare Supplemental Health Benefits, establish a minimum pension benefit based upon years of service and report to the 78th General Convention with findings and specific recommendations for implementation of said benefits.

It should be noted that the Office of Congregational Vitality was eliminated shortly after the 2012 General Convention concluded. The SCSC used one of its meetings to meet with The Rev. Canon Patricia Collier, Mr. Frank Armstrong, and Mr. Matthew Price of the Church Pension Group. Their presentation made clear the difficult legal and practical problems involved in attempting to provide benefits for persons who do not qualify for their existing plans.

There are fiduciary problems and legal issues under the federal statutes governing pension funds (ERISA, etc.). The SCSC’s general conclusion is that under the existing pension system, clergy who are otherwise non-stipendiary should be paid the minimum amounts required to qualify for credit toward pension benefits and Medicare Supplemental Health Benefits. This is a matter of equity and justice. Paying into the system would not solve the problem of providing for current retirees, but over time it would address the situation of future retirees.

### **PROPOSED RESOLUTIONS**

The SCSC has prepared and submitted three resolutions to address the most critical needs of small churches: (1) *Maintain the Centrality of the Eucharist*, (2) *Provide Lay Leadership Formation Resources*, and (3) *Appoint Task Force for Clergy Leadership Formation in Small Churches*. The resolutions follow:

#### **AO44: MAINTAIN THE CENTRALITY OF THE EUCHARIST**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention provide and authorize ways in which small congregations can receive the sacrament at the principal act of Christian worship on the Lord’s Day in the absence of a deacon, priest, or bishop; and be it further

*Resolved*, That the licensing of lay ministers be expanded to allow distribution of previously consecrated sacrament in the context of Sunday public worship in the absence of a deacon, priest, or bishop; and be it further

*Resolved*, That a liturgical rite be designed for the distribution of communion by such licensed lay ministers in the congregation at Sunday public worship in the absence of a deacon, priest, or bishop; and be it further

*Resolved*, That congregations provide education regarding distribution of communion by such licensed lay ministers.

EXPLANATION

At the Institution of the Lord’s Supper, Jesus Christ said, “Do this in remembrance of me,” and The Book of Common Prayer states that the Holy Eucharist is “the principal act of Christian worship on the Lord’s Day” (p.13). We strive to sustain the witness and Eucharistic charism of Episcopal congregations when the frequency of the presence of a priest or bishop to celebrate the Eucharist is not regular, given the difficulty of small congregations to be able to have a priest every Sunday.

Taking into account the Eucharistic character of the Church, we seek to provide for ways in which congregations can receive the sacrament weekly in the absence of a regular priest or bishop. (For example, a deacon or licensed Eucharistic minister could attend an early service at a church with a priest and then take the Sacrament to a congregation to be distributed, or the Sacrament could be consecrated at a central church on a given Sunday to be given to a deacon or licensed Eucharistic minister to be distributed on subsequent Sundays.)

A045: APPOINT TASK FORCE FOR CLERGY LEADERSHIP FORMATION IN SMALL CHURCHES

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention appoint a task force consisting of no fewer than 10 nor more than 20 representatives including, but not limited to, representatives from local diocesan programs, representatives from seminaries, ecumenical representation, or representatives who are engaged in advanced theological education; and that the task force be made up of bishops, priests, deacons, and laity to explore quality programs for formation, for expanding education opportunities for clergy and laity, for collaboration between local diocesan school programs and seminaries, for ecumenical collaboration, and to explore a wide range of delivery methods. The task force shall report back to the 79th General Convention with a plan to provide quality formation for clergy in small congregations that is affordable, theologically reflective, and innovative; and be it further

*Resolved*, That the General Convention request the joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$150,000 for the implementation of this resolution.

EXPLANATION

It is the obligation of the Church to provide all persons with equal opportunity and access to quality lifelong formation. The majority of churches in TEC are small churches (69 percent of Episcopal congregations have an ASA of 100 or fewer people, with the median average Sunday worship attendance of 61 people).

Many churches are being served by part-time clergy, both priests and deacons, many of whom are non-stipendiary. Many who feel called to serve small congregations, and many of those who are serving small congregations, cannot afford the cost, in terms of either time or financial resources, of full-time seminary



formation. A Constable Grant may be applied for to cover costs for task force meetings and preparation of its report.

**AO46: PROVIDE LAY LEADERSHIP FORMATION RESOURCES**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention mandate that the Office of General Convention and/or the Executive Council establish and make easily accessible a regularly updated and maintained online resource list and library of materials and programs for licensed lay leadership in small congregations; and be it further

*Resolved*, That every diocese be interviewed to determine if there are any local internal resources that may be appropriate to be included in the resource list so that each diocese may provide leadership formation for all licensed lay ministries through a variety of methods appropriate to the need of the diocese; and be it further

*Resolved*, That a report by the Executive Council be made to The Episcopal Church by June 30, 2016 so that access to information may be distributed to the wider Church; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$100,000 for the implementation of this resolution.

**EXPLANATION**

It is the obligation of the Church to provide all persons with equal opportunity and access to quality lifelong formation. The majority of churches in The Episcopal Church are small churches. Sixty-nine percent of Episcopal congregations have an ASA of 100 or fewer people, with a median average Sunday worship attendance of 61 people.

The Episcopal Church affirms the validity and vitality of lay leadership, and many small congregations are being served primarily by lay leadership. Title III.4.3-9 provides for licensed lay ministries in a variety of leadership capacities; and there is a need for appropriate, accessible, and affordable training and formation for these licensed lay ministries.

**Budget**

Funds in the amount of approximately \$15,000 remained from the 2009-2012 triennium budget. These funds allowed us to attend the joint CCAB meeting in St. Louis in November 2012. The Executive Council granted the SCSC a budget for 2013-2015 of \$16,000. This triennium, the SCSC also received a grant from the Constable Fund in the amount of \$43,000, which allowed us to hold the Symposium on Formation for Small Church Leadership at the American Airlines Training & Conference Center in Fort Worth, Texas. The Constable Grant funds and the 2012-2015 budget were used to hold an additional in-person meeting at the Crowne Plaza Chicago-O'Hare, Illinois. Approximately \$11,900 of the triennial budget remains available for use in 2015. The SCSC requests that it be granted a budget of \$32,000 for the 2016-2018 triennium.

# STANDING COMMISSION ON ANGLICAN AND INTERNATIONAL PEACE WITH JUSTICE CONCERNS

## Membership

Ms. Brenda Hamilton, *Chair*, 2015  
The Rt. Rev. James Magness, *Vice Chair*, 2018  
The Rev. Devon Anderson, 2015  
The Rt. Rev. Francisco Duque, 2015  
The Rt. Rev. Leopold Frade, 2015  
Dr. T.J. Geiger, 2015  
The Rev. Canon Dr. Isaac I. Ihiasota, 2015  
The Rev. John Kitagawa, 2018  
Dr. Dora Mbuwayesango, 2018  
Ms. D. Rebecca Snow, 2018  
Mr. Ethan Vesely-Flad, 2015  
Ms. Rebecca Wilson, 2018  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*, 2015  
The Rev. Gay Clark Jennings, *Ex Officio*, 2015  
Ms. Karen Longenecker, *Executive Council Liaison*  
The Rev. Jon Richardson, *President of the House of Deputies Representative*  
Mr. Alex Baumgarten, *Staff*

### *Changes in Membership*

The Rev. John Kitagawa replaced The Rev. William Stokes, who resigned when he was elected Bishop of New Jersey.

### *Representation at General Convention*

Bishop James Magness and Deputy Brenda Hamilton are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To develop recommendations and strategies regarding common ministry opportunities and concerns with other Provinces of the Anglican Communion as to the work of this Church and the Anglican Communion on issues of international peace with justice and to make recommendations pertaining thereto to the Presiding Bishop, the Executive Council, and the General Convention.

**Meetings:** The Commission met first in St. Louis, Missouri from November 13-15, 2012, along with all the other CCABs. The Commission opened the meeting by first establishing norms among members of the Commission. Following this discussion, elections were held. Ms. Brenda Hamilton was elected Chair of the Commission. Bishop Jay Magness was elected Vice Chair. The Rev. Isaac Ihiasota was appointed Chaplain. Rebecca Wilson served as Secretary for the first meeting. For the remainder of the triennium, various members of the Commission served as note-takers and recorders for meetings and will assist in the posting of those notes in minutes format to the GCO extranet before the end of the triennium.

The Commission met virtually several times via Adobe Connect: June 13 and July 10, 2013, and on April 4, 2014. Virtual meetings were a new format for several members and presented significant challenges to the kinds of relationship-building and creative discussion of ideas that had characterized the Commission during past triennia. Another serious challenge posed by budget reductions was the inability to engage in any

foreign travel, which has been a primary tool in past triennia for relationship-building with Anglican Communion partners and for direct observation of foreign mission opportunities. After lagging somewhat, the work of the Commission was revitalized beginning in March 2014, with a written exercise that involved all members in archive research and review of previous meeting notes and extranet discussions, which helped to further define and focus issues related to referred resolutions.

During the Adobe conference on April 4, 2014, the Commission reviewed the Issues Worksheets submitted by the membership that had then been reviewed and organized into thematic groups by the Chair and Vice Chair. Based on that review, the Commission created four Working Groups to work with resources and consultants outside the Standing Commission to gather a range of perspectives and information to inform policy and mission recommendations. It also reviewed and discussed documents (posted on the extranet) that helped to outline the scope of work that the Commission would endeavor to complete by the end of the triennium and to set a specific timeline for remaining meetings and writing of the Blue Book reports and resolutions. Finally, note was made of issues that might require further collaboration with other CCABs.

Leading up to a face-to-face meeting in May 2014, the Chairs conferred by telephone on several occasions with advocacy groups, with The Episcopal Church's Office of Government Relations (OGR), and with other members of Commission to line up consultations and briefings. The Commission continued to receive reports on the B019 Coordinating Committee from representative member Rev. John Kitagawa and from OGR staff member Alex Baumgarten. The Commission also received various reports from our members of the House of Bishops, especially noting the resolutions of HoB in support of the Church in Venezuela and of human rights issues concerning Haitians in the Dominican Republic. Other world events were monitored (especially in Syria, Sudan, and Ukraine) for the need to issue interim recommendations to the Executive Council.

From May 19-22, 2014, several members of the Commission met face-to-face in Washington, D.C. to further explore areas of interest and to finalize the selection of topics for the development of specific resolutions that follow in this report. The face-to-face meeting included consultation with Mr. Alex Baumgarten from OGR; with Mr. Talmage Day from the Committee on Science, Technology, and Faith; and with Ms. Lelanda Lee from the Joint Standing Committee on Networking and Advocacy — as well as meetings with organizations working on advocacy and services for victims of human trafficking.

Given the challenges of convening plenary meetings, the Chair not only elected to host daily “open hours” for work sessions via Adobe during the final week before deadline, but also served as general editor for this report. This allowed a majority of members of the Commission to participate in the process of writing, commenting on, and refining resolutions and the narrative of the Blue Book report through a combination of phone and Adobe conversations, and postings to the CCAB extranet site.

## **Introduction**

To fulfill its mandate, the Commission was blessed with a rich diversity of clergy and lay people with keen interests, seasoned expertise in the work of the Church throughout the world, and deep passions in a variety of professional fields. The racial and cultural backgrounds of the Commission's 12 members represented cultures from the African continent, Asia and Latin America, and a variety of regions within the United States. Commission members brought to the table their experiences in international religious and humanitarian organizations, military chaplaincy, consulting and communications, peace movements, legislative advocacy, nonprofit agencies, health care and public health, parish ministry, universities, and more.

The Commission identified three referred resolutions as informing its work plan for the triennium. Referred resolutions B019, D005, and A017 were addressed through study, discussion, and collaboration with both the

B019 Coordinating Committee and the Executive Council's Committee on Science, Technology, and Faith. The Rev. John Kitagawa was assigned as this Commission's representative to the B019 Coordinating Committee.

These collaborations — as well as conversations with the Standing Commission on Social Justice and Public Policy, and outputs from the U.N. Conference on the Status of Women and from the Anglican Consultative Council — informed the triennial work of this Commission on topics as broad-ranging as immigration policy and refugee migration, genetically modified organisms, political upheaval and abductions in Liberia, theological frameworks on moral injury and violence, corruption, terrorism, drone technology, the complexity of finding political and economic solutions to the escalating conflict between Israel and Palestine, human rights issues in the Occupied Territories, national security for the state of Israel, and mission support for Anglican partners in the Diocese of Jerusalem.

Other areas of focus and collaboration that were explored over the course of the triennium were gender-based violence, peacemaking efforts in African nations, land use, truth and reconciliation in Latin America (especially Colombia), and implications for The Episcopal Church of the gradual softening of political separation between the United States and Cuba. With the formation of a Coordinating Committee on Human Trafficking, the Commission requested representation based on prior interest and expertise among members and was pleased to assign The Rev. Devon Anderson to participate in the work of that Committee.

The Commission drew upon several resolutions from the Anglican Consultative Council (ACC) to inform its work seeking consistency between the foreign policies of The Episcopal Church and priorities identified by the world-wide Anglican Communion. At their initial face-to-face meeting in November 2012, the Commission collaborated on these particular matters with The Rev. Gay Clark Jennings, President of the House of Deputies; and with Mr. Alex Baumgarten, Director of The Episcopal Church's Office of Government Relations (OGR).

Jennings spoke with the Commission in relation to her attendance at the ACC-15 meeting in Auckland, New Zealand in October-November 2012. Jennings and the Commission discussed areas of interest, issues, and groups that posed potential for future work and collaboration. Over the course of the triennium, Mr. Baumgarten conferred with the Commission regarding ongoing work within OGR on immigration reform, federal spending, South Sudan, and Israeli/Palestinian conflicts and foreign aid policy. With Baumgarten, the Commission discussed Resolution B019 and ways in which the Commission can support The Episcopal Church's advocacy for a two-state solution that respects human rights in both.

Before delving into further detail about the work of the Commission during the current triennium, a few words about the future of our mandate are in order. Striving for justice and peace in the world, and strengthening God's people for that mission, are hallmarks of the Christian faith. Christ's teachings to care for the poor and the oppressed, and to spread the peace of God throughout all nations, are essential messages of the Gospel.

As the structures of The Episcopal Church undergo adaptive change over the course of coming triennia, the Standing Commission on Anglican and International Peace with Justice Concerns strongly urges the General Convention, the Executive Council, and the various Offices of the Domestic and Foreign Missionary Society (DFMS) to secure a place amid the bodies of the Church where both laity and clergy can continue to work on this important mandate.

## Description of Work

Discernment by the membership resulted in the Commission's undertaking to study, discuss, and make recommendations in four principal areas of inquiry:

### 1. Moral, Ethical, and Theological Frameworks for Addressing Global Conflicts, Extremism, and Technological Warfare

Referred resolutions D055 and A017 led to many conversations regarding the moral and ethical implications of technological (robotic) warfare, and eventually evolved toward a desire to look at the socio-cultural roots of extremism, the spiritual impact of conflict upon a global society, and the subsequent need for pastoral care and healing for both military personnel and displaced persons — rather than trying to address issues of terrorism and “drones” from a military, political foreign policy, or jurisprudence perspective.

When considering both of these referred resolutions, early discussions with The Rev. George Clifford and other theologians noted that while the Church has theological frameworks, such as the Just War tradition, with which to approach the moral and ethical ramifications of military conflicts between nations, we do not have similar comprehensive theological or ethical frameworks with which to approach the subjects of global terrorism or the use of military troops in peacekeeping missions and nation-building.

Early in our process, we recognized that an attempt to contribute to the development of such comprehensive theological frameworks was beyond the scope of our abilities. However, The Rt. Rev. James Magness' participation in the Oklahoma conference on Building a Culture of Peace fueled interest among Commission members to bring forward the work being done around “moral injury” among military personnel — including the operators of weaponized Remotely Piloted Vehicles (RPVs, or “drones”) — and to recognize the moral and ethical implications of the use of drones among civilian populations, which at times become the collateral victims of this particular type of military engagement, while also recognizing drone technology's ability to limit such civilian “collateral damage.”

Research and discussion by this Commission regarding RPVs acknowledged the rapid pace of technological development and the inability of theological and moral discussions to keep up with the pace of how that technology is being utilized and applied. In addition to equipping “the church on the ground” to address the needs of military personnel and veterans, this Commission recognized the need to engage seriously in discerning what it means to love one's enemy by also addressing the psychological and spiritual impact of remote or technological warfare, the global actions of extremist groups, and prolonged exposure to life in conflict zones upon people who live outside our borders and who may rightly or wrongly be considered our enemies. Displacement and forced migration, traumatic stress, and existential and physical human suffering are daily realities for people in many parts of the world and contribute to the ability of extremist groups to recruit individuals to their causes.

Given the enormity and complexity of these issues, resolution writing was very difficult. The recommendations presented here touch only the tip of the iceberg, but they attempt to focus The Episcopal Church's attention, resources, and ministry upon what we as a Church can best do to bring God's love and healing to a global society that is fraught with religious and ethnic hatred and violent political conflicts.

### PROPOSED RESOLUTIONS

AO47: ADDRESS MORAL AND SPIRITUAL INJURY IN CONTEXT OF TRAUMA AND POST-TRAUMATIC STRESS

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church call the Church to a triennium of pastoral care and Christian formation that is focused upon those whose lives have

been directly and indirectly impacted by exposure to traumatic events related to global and domestic terrorism, the violence of warfare, and displacement through natural and man-made disasters, to address the effects of massive and chronic exposure to these particular expressions of violence and global chaos; and be it further

*Resolved*, That a consortium be formed among the of the Office of Global Partnerships; the Office of the Bishop Suffragan for the Armed Forces and Federal Ministries; the Office of Diversity, Social, and Environmental Ministries; and Episcopal Migration Ministries, along with representatives of the Church appointed by the Executive Council, to consult with relevant experts in the field, to collect and make available relevant resources, and to coordinate communication among a wide network of ministries focused upon healing from traumatic stress injuries related to warfare, terrorism, and population displacement; and be it further

*Resolved*, That the same consortium make available to military chaplains, parish clergy, and lay ministers resources and training specific to helping them address the needs of uniformed men and women of the armed forces and of veterans who either continue to be directly or virtually involved in global combat engagements or who are returning from service with “spiritual and moral injuries;” and be it further

*Resolved*, That the same consortium work with Anglican Communion partners and with migration and refugee organizations to develop or disseminate resources for the relief of traumatic stress and to promote spiritual healing for women, men, and children who are affected by terrorist organizations that continue to be intent on harming innocent, non-combatant populations through intimidation, recruitment, physical violence, and geographic displacement; who are the non-combatant victims of military engagements; or who are the subjects of population displacements due to terrorism, military combat, or large scale environmental disasters; and be it further

*Resolved*, That the same consortium present annual progress reports to the Executive Council, and a triennial report to the 79th General Convention of The Episcopal Church, on the progress that has been made to address this need, with recommendations for further action; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$20,000 for the implementation of this resolution.

**EXPLANATION**

During and after the 77th General Convention of The Episcopal Church, members of the Standing Commission on Anglican and International Peace with Justice Concerns were engaged in numerous conversations and research about emerging theories that pertain to what has been described as "moral injury." Initially, what was studied had primarily been applied to military service members who were engaged in real-time but virtual, traumatic, combat-related events (i.e., unpiloted or remotely piloted aerial vehicle operators). Psychological and emotional effects akin to what has historically been referred to as combat fatigue or combat stress have been documented among these operators. Extensive research and clinical treatment of direct combat stress over the past half century has led to a better understanding of what has come to be diagnosed as Post-Traumatic Stress Disorder (PTSD).

The emerging body of work that the Commission studied seeks to move beyond a strictly clinical diagnosis of PTSD. The basic understanding of traumatic or moral injury is that service members who have experienced

combat-related traumatic events potentially have injuries to the soul, and that these injuries frequently are overlooked. In addition to psychological treatment, there is a growing recognition of the need for spiritual healing, including pastoral care and ritual that speak specifically to this type of injury, which is caused in part by the experience of extreme dissonance between deeply held core beliefs or values and lived military or other traumatic experience.

Our interest in this subject evolved into a discussion about how these theories could be applied to the individual and corporate effects of post-traumatic stress and moral dissonance resulting from a wider range of exposure to other types of violence among civilian populations. We theorized that if military service members experience injury by being exposed to such trauma and moral dissonance, it is likely that other members of our society who are exposed to traumatic events in theaters of war, in regions of famine, on the streets of our cities, in homes, in schools, and in workplaces might also be spiritually and morally injured and be in need of assistance. At a congregational level, we recognize that dealing with such injured persons and their families can be a challenge requiring advanced training for both clergy and laity.

Related to our interest in how we work in spiritual ways with violence related-trauma, we had numerous discussions about what constitutes the ethical operation and targeting of unpiloted or remotely piloted vehicles, also known as Unmanned Aerial Vehicles (UAVs), or “drones.” Inasmuch as our interest in violence-related traumatic events was a pastoral concern, our interest in UAV operation was rooted in our commitment to the prophetic side of our Christian tradition and in a desire to set these circumstances into a theological context.

**AO48: CONFRONT THE CHALLENGES AND IMPACTS OF ROBOTIC AND CYBERWARFARE**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention bear witness to the moral challenges to the Just War tradition and to the implications for security, privacy, and other human rights posed by evolving capabilities for cyberwarfare, by the integration of “big data” and robotics, and by the new types of combat enabled by these trends; and be it further

*Resolved*, That the General Convention express concern for the personal and cultural impacts and social dislocations occurring in areas where remotely operated weapons are deployed; and call for greater attention to the need to mitigate the personal, cultural, and social impacts of cyberwarfare inasmuch as they are a factor that gives rise to continued violent extremism in the regions now experiencing conflicts; and be it further

*Resolved*, That the General Convention, while acknowledging the greater tactical precision achieved through deployments of remotely operated aircraft and other weapons, articulate support for alternatives to targeted killings whenever and wherever feasible, and call for ministry by this Church to the moral dissonance and suffering of operators of remotely operated weapons who experience, as a consequence of sustained monitoring of targets, an experienced sense of involvement in the lives of their targets and their families; and be it further

*Resolved*, That the persons or committees designated by the Presiding Bishop, the Standing Commission on Anglican and International Peace and Justice Concerns, and the Committee on Science, Technology, and Faith report to the 79th General Convention on the implications for the Just War tradition, security, privacy, and other human rights of developments and trends in cyberwarfare, tactical uses of social media, and the integration of “big data” and robotics.

## EXPLANATION

This resolution addresses issues posed in Resolution A017, as adopted by the 77th General Convention. In our joint discussions, the Standing Committee on Anglican and International Peace with Justice Concerns and the representative of the Executive Council Committee on Science, Technology, and Faith concluded that we must respond in two ways. First, we concluded that the rule of law (i.e., international law) and applicable parts of Just War theory ought to be followed when assigning and acquiring targets. The second conclusion was, as stated more expansively in a companion resolution on traumatic stress and violence resolution — that attention must be given to the operators of these aerial vehicles.

Our work reviewing the implications of drones during this last triennium has concluded that remotely operated weapons are significant as tactical weapons that in many circumstances permit more proportionate applications of force than alternatives and are, in that respect, fully consistent with the principles of the Just War tradition. Further, given the dependence of drone operations on tactical and logistical support in their theaters of operation, the moral issues posed by drones are fundamentally quite similar to the issues posed by covert warfare generally. These issues generally reflect the challenges posed by the changed nature of threats from violent extremists, compared with threats from nation states, and by the capabilities for networked terrorist recruitment and violence created by globalized social media.

The resolution further acknowledges that the greater capability created by drones for monitoring at high resolution the activities of intended targets for extended periods of time, including the interactions of targets with their families, can cause experiences of moral dissonance that are qualitatively different from those experienced by soldiers on conventional battlefields, albeit with similarities in some circumstances. There is a role for pastoral ministry in supporting operators, their families, and others involved in this new kind of warfare that needs concerted support from the Church.

The impacts of targeted killings for further recruitments in “revenge cultures” are clearly a concern, but the Commission is likewise mindful that the devastation being experienced in traditional societies is not exclusively a consequence of remotely directed targeted killings. Violent religious extremists have targeted and executed tribal elders to project their power in the lands where drones are operating, with the result that the tribal structures that previously maintained order have been severely weakened, perhaps beyond the point of revival. This is largely a consequence of murders by terrorists.

Similarly, while the Just War tradition is support for alternatives to targeted killing, the Commission is concerned that too often, alternatives are not feasible due to the political disruption in a weak state that may occur when a target is seized, due to political resistance to trials in the United States, and due to the sheer scale of terrorist groups. Steps other than capture are necessary to encourage orderly paths for political integration of disaffected regions that are only loosely under the control of central governments. Too often, the central authorities do not provide security and rule of law and are validly perceived as remote, ineffective, and corrupt.

Proportionately, within any society, terrorists are a minority, including in the lands where they are operating as quasi-states or in safe havens. While the motives for any particular person to become a violent extremist are nuanced and complex, the Commission is mindful that the social disruptions and involuntary migrations attributable to water scarcity, degradation of crop lands, and crop failures have created ready pools for terrorist recruiting among dislocated, alienated populations of climate refugees. Meaningful action to mitigate the impacts of climate change is one essential element in strategy to eradicate the roots of violent extremism, an effort that the Commission acknowledges will not occur quickly.



## 2. Equality and Empowerment of Women and Other Marginalized People

After considering a broad range of issues impacting women and other marginalized people around the world, the Commission's subcommittee focused on the following resolutions in consideration of their potential for peacemaking through economic development and protection of human rights.

### A049: MAKE GENDER EQUALITY AND EMPOWERMENT OF WOMEN A FOCUS OF FOREIGN AND CHURCH AID

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention commend giving priority to gender equality and empowerment of women by using the following principles as appropriate standards for distribution of foreign aid by the United States: Any proposed economic aid will increase economic capacity, using methods such as global trade and financial and investment agreements, and will include the direct involvement of and capacity building for women; any proposed aid for health care will require a goal of universal coverage, ensuring access without discrimination for women and girls to all types of services offered, without imposing financial hardship on the patient; any proposed aid for agriculture or aquaculture will facilitate the participation of women in the programs; any proposed aid responding to financial or economic crises or natural disasters and their aftermaths will include steps to minimize negative impacts on gender equality and empowerment of women, providing opportunities for women's employment, and access to essential services and social protection systems for women's and girls' and other vulnerable and disadvantaged persons' human rights; and any proposed aid for environmental and climate-change issues will promote full and equal participation of women at all levels of decision making regarding the use of such aid; and be it further

Resolved, That 78th General Convention commend the achievement of gender equality and empowerment of women through capacity building to dioceses and congregations throughout the Domestic and Foreign Missionary Society as a criterion for engagement in domestic and international projects, whether through direct aid or involvement of personnel.

#### EXPLANATION

The Millennium Development Goals, most of which will not meet their deadline for accomplishment in 2015, included specifically to "Promote gender equality and empower women," as well as several other goals that would improve the conditions under which women and girls live in much of the world. As the MDGs pass into history, it would be good to retain one of the central tenets of the Goals.

Research has shown that improving the status of women and their educational level raises the economic status of their families and the economy around them. This resolution seeks to extend the application of these goals and benefits through a set of principles to guide US foreign aid policy, to the extent that our government affairs office has opportunities to participate in discussions about such policy.

The 13th Anglican Consultative Council passed a resolution acknowledging "the MDG goal for equal representation of women in decision making at all levels" and requesting "all member churches to work towards the realization of this goal in their own structures of governance, and in other bodies to which they nominate or appoint." Since the Church is determined to treat women equally within its structures, it seems appropriate to use a similar lens through which to view the work it does outside its own structures as well, both domestically and internationally.

The principles outlined in this resolution are based on some of the agreements set out in the report of the 58th Meeting of the UN Commission on the Status of Women (2014).

A050: ADOPT AND IMPLEMENT CHARTER FOR SAFETY

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention join the 2012 Anglican Consultative Council in adopting the following "Charter for Safety of People Within the Churches of the Anglican Communion" as a summary of The Episcopal Church's policy regarding maintaining the safety of all who come to or work for our churches:

“1. Pastoral support where there is abuse — We will provide pastoral support for the abused, their families, and affected parishes and church organizations by listening with patience and compassion to their experiences and concerns; offering spiritual assistance and other forms of pastoral care.

2. Effective responses to abuse — We will have and implement policies and procedures to respond properly to allegations of abuse against clergy and other church personnel that include: making known within churches the procedure for making complaints; arranging pastoral care for any person making a complaint of abuse; the impartial determination of allegations of abuse against clergy and other church personnel, and assessment of their suitability for future ministry; providing support for affected parishes and church organizations.

3. Practice of pastoral ministry — We will adopt and promote, through education and training, standards for the practice of pastoral ministry by clergy and other church personnel.

4. Suitability for ministry — We will have and implement policies and procedures to assess the suitability of persons for ordination as clergy or appointment to positions of responsibility in the church, including checking their background.

5. Culture of safety — We will promote a culture of safety in parishes and church organizations by education and training to help clergy, other church personnel, and participants prevent the occurrence of abuse;”

and be it further

Resolved, That the Executive Council collect current data from all member dioceses regarding their "safe church" policies and practices, including identification of reasons for not implementing the recommended policies and practices; and publish that information to The Episcopal Church through its most widely accessible media; and be it further

Resolved, That the Office of Global Relations collaborate with Province IX to develop and disseminate culturally appropriate materials for use in the Spanish-speaking dioceses of TEC that are consistent with the principles of the ACC "Charter of Safety" and the standards previously set out by General Convention, including a process for training of local trainers; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$ 40,000 for the implementation of this resolution.

## EXPLANATION

Anglican Consultative Council 15, meeting in 2012, adopted Resolution 15.09, calling "upon all member churches to adopt and implement the ... Charter for the Safety of People within the Churches of the Anglican Communion and report to the next meeting" of the ACC as to steps taken. The 78th General Convention is TEC's first opportunity to consider this resolution. While General Convention is on record as approving guidelines for protection of children (2003-Boo8) and adults (2006-A156), not all dioceses have implemented the recommended policies and procedures. The 2009 Blue Book report of the Church Pension Group reported that CPG has training materials and model policies available to the Church.

But it also reported that only 45 dioceses had training in place, although 25 others were considering the CPG materials. Thus it seems quite timely for TEC to join its sister provinces of the Anglican Communion in holding up the continuing pastoral need to ensure that our churches are safe against abuse, misconduct, and exploitation for all who come to them and all who work in them. By doing so, we will also be reminding ourselves that we have more work to do to ensure that our own values and policies are indeed implemented.

Although some of the previous resolutions have called for data on compliance, if the information has been collected, it has not been widely reported to the whole Church. None of the previous mandates for collection of information from the dioceses has sought to discover what the barriers have been to implementation -- data that would help the CPG, for example, to refine its materials and expand their use. One factor is obvious, however, particularly for TEC's international dioceses: not all of TEC's dioceses share the common language and cultural norms reflected in the available training materials.

Given our commitment to integrate all dioceses into this international province of the Anglican Communion, we need to begin to develop appropriate materials in collaboration with Episcopalians from those other cultures. Province IX is the most cohesive place to begin this effort. The necessary collaboration and preparation of Province IX trainers will make the process costly. Not to do both pieces properly will be even more costly.

## A051: SUPPORT LGBT AFRICAN ADVOCACY

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church encourage parishes, dioceses, especially those with companion relationships in Anglican Africa, as well as advocacy groups, to build relationships with African Anglican scholars and activists who are working to advance generous understandings of the Bible that affirm the dignity of lesbian, gay, bisexual, transgender, and intersex people; and be it further

*Resolved*, That the Office of Global Partnerships, Justice, and Advocacy Ministries; the Office of the Presiding Bishop; and other relevant church-wide offices be directed to support efforts of African Anglicans who publicly oppose laws that criminalize homosexuality and incite violence against lesbian, gay, bisexual, transgender, and intersex people; and be it further

*Resolved*, That The Episcopal Church direct the Standing Commission on Anglican and International Peace with Justice Concerns or other appropriate standing commission to compile for church-wide reference and use a listing of information and resources developed by African Anglican leaders and organizations working to curb anti-gay violence, discrimination, and marginalization. In the event that there is no Standing Commission whose charge encompasses this work, a task force pursuant to Joint Rule of Order IX.22 of at least two priests or deacons, two lay people, and two bishops shall be appointed to complete this work by the 79th General Convention.

**EXPLANATION**

According to Amnesty International, “legal rights are diminishing for lesbian, gay, bisexual, transgender and intersex (LGBTI) people across the African continent.” In Uganda, where it was already illegal to be gay, the Anti-Homosexuality Act passed by the parliament lengthened sentences for consensual homosexual sex and made it illegal to “promote” homosexuality. In Nigeria, “the conditions of imprisonment have become wider, and the punishment much harsher, when Nigeria's president passed amendments to existing laws in January 2014.” A similarly harsh bill has been proposed in Kenya’s parliament.

Too often, the Bible is cited as a text that justifies these draconian punishments and the violence and discrimination that accompany them. But across Anglican Africa, an increasingly active network of church leaders, scholars, and activists is working to change ways of interpreting the Bible’s teachings on human sexuality and to use those new, more generous understandings to oppose draconian anti-gay laws and violence against LGBTI people.

Church-wide offices and Episcopal parishes and dioceses with companion relationships in Anglican Africa can form relationships with these African leaders and scholars who are working to change the Church’s legacy of anti-gay teaching.

The Standing Commission on Anglican and International Peace with Justice Concerns, its successor, or a task force pursuant to Joint Rule of Order IX.22 can compile information and resources about this work happening in African Anglican contexts. These resources will help church-wide offices, parishes, dioceses, and advocates develop and facilitate relationships among people in different contexts working to stop anti-gay violence across the Anglican Communion.

**Report on Human Trafficking Coordinating Committee**

In late April 2014, the Executive Council formed a Coordinating Committee on Human Trafficking to address Resolution Do42, which was passed at the 77th General Convention. A convener was appointed in early May. The Standing Commission on Anglican and International Peace with Justice Concerns nominated Devon Anderson to serve as its liaison to the Do42 Coordinating Committee.

The Do42 Committee began with email introductions and had its first conference call on July 1, 2014. During this call, it was decided that a needed resource was a web-based toolkit. This toolkit, which would be placed on a web page with other resources, would be not only for those interested in learning more about the issue of human trafficking, but also for those working with survivors or eager to work with survivors. It would list who, in each province, was working with survivors and could be a local resource for others.

In following the spirit of Resolution Do42, the idea was that the web page and toolkit could reach all areas of the Church and could be translated into the many languages spoken by The Episcopal Church. Human trafficking exists everywhere, and no one area can combat trafficking alone. The resolution sought to bring together people who are at all stages of their learning about human trafficking — from ones eager to begin to understand this scourge, to those who already work with survivors.

Resolution Do42 also discusses Provincial Representatives. During the first call, members of the Coordinating Committee agreed to ask our respective provinces for coordinators who would be willing to serve as links between the Committee and the wider Church. The toolkit would contain the coordinators’ information. To date, the Coordinating Committee has identified coordinators from several provinces, but is still seeking others.

The initial meeting ended with a decision to promulgate a survey to the Church regarding its awareness of, and work with, human trafficking and its survivors. Each member was tasked with creating questions for this survey.

The Committee met a second time, on July 28th, 2014, via conference call to discuss the survey. It needed many elements: an opening for understanding of the issue, questions about knowledge, efforts taken, policy concerns and challenges, and a closing for further information. The survey questions were reviewed, and members were chosen to craft the opening and closing pieces of the survey. The group is currently finalizing the survey, and hopes for widespread dissemination soon.

After the survey is finalized, the Coordinating Committee hopes to utilize Listservs already in place to promulgate it. There is also a hope that the toolkit and web page can be hosted by either an organization connected to The Episcopal Church, or on The Episcopal Church website.

Due to the Committee's recent beginnings, it is seeking to continue its work for the rest of this triennium. The Committee has begun a fruitful discussion of the issue of human trafficking and the work that is already being done. For the rest of this triennium, committee members hope to finalize and disseminate the survey, tabulate the results, and create a web page/toolkit to showcase resources available for anyone interested in this issue.

### **3. Regional Issues in the Middle East**

The B019 Coordinating Committee was formed early in the triennium in recognition of mutual interest and shared responsibilities among the Standing Commission on Anglican and International Peace with Justice Concerns, the Executive Council, and the Office of the Presiding Bishop. The current Chair, The Rev. Canon John E. Kitagawa, was appointed about a year into the triennium. The Coordinating Committee's work was mainly done through two Adobe Connect meetings, the extranet, emails, and telephone contacts between the Chair and Episcopal Church Washington staff. Much of the work was hampered by lack of budgetary resources, including those necessary to produce and widely distribute an annotated bibliography of resources.

Episcopal Church staff contributed greatly to the limited achievements in accomplishing Resolution B019's goals. A major feature of the resolution was a request for the Presiding Bishop to lead an Interfaith Pilgrimage to the Holy Land. This is currently scheduled for the latter part of January 2015. Thus, any reporting or recommendations flowing from the visit will come after Blue Book deadlines. The Coordinating Committee Chair submitted a report to be incorporated into the Executive Council's *Blue Book* report.

Knowing that the work of the B019 Coordinating Committee, the voices of several advocacy groups, and several diocesan resolutions would represent the Church's best efforts to grapple with questions of policy on Israel and Palestine, and would give the 78th General Convention plenty of material to work with in terms of the content of that policy, the Commission recognized that what it could best contribute was a focus on shaping the process through which we discern our way forward. We begin with this prayer:

*Prayer in Times of Conflict –*

*O God, you have bound us together in a common life. Help us, in the midst of our struggles for justice and truth, to confront one another without hatred or bitterness, and to work together with mutual forbearance and respect; through Jesus Christ our Lord. Amen. (BCP p. 824)*

A052: CALL FOR UBUNTU WITHIN THE EPISCOPAL CHURCH REGARDING POLICY TOWARD PALESTINE AND ISRAEL

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention call upon members of The Episcopal Church to engage in an intentional process of "Ubuntu" and of peaceful, mutual discernment

regarding the policy approaches of TEC toward advocacy, economic investment or divestment, humanitarian mission, and peacemaking in Palestine and Israel; and be it further

*Resolved*, That the Office of the Presiding Bishop, the Office of Government Relations, the Episcopal Public Policy Network, and a broad range of advocacy groups and ministries within the Church be tasked with collaboratively defining and facilitating such a process, to be enacted at all levels of the Church — community, congregational, diocesan, national, and international; and be it further

*Resolved*, That this collaborative group collect and disseminate a wide range of educational resources, and collaborate with a wide range of policy experts, humanitarian aid organizations, and ecumenical and interfaith groups to inform and enliven a process of listening and conversation among those of differing convictions; and be it further

*Resolved*, That methods of peacemaking and mediation be applied so that The Episcopal Church in its deliberations and advocacy efforts might model the love of God and the possibility of civil dialog over controversial and confounding issues of global conflict.

#### EXPLANATION

The ‘philosophy’ of Ubuntu derives from a Nguni Bantu term roughly translating to “human kindness.” It is an idea from the Southern African region that means literally ‘human-ness’ and is often translated as “humanity toward others,” but is often used in a more philosophical sense to mean, “the belief in a universal bond of sharing that connects all humanity.”<sup>[Wikipedia]</sup>

Ubuntu is a way of being with one another that The Episcopal Church has invoked in other times of crisis, when people of good faith from around the wider Church and the Anglican Communion have vehemently disagreed with one another on matters of theology, policy, and human relationships. While Episcopalians may differ in their opinions of how successfully we have utilized this concept, the living force of Ubuntu in communities in Southern Africa and in the teachings of Bishop Desmond Tutu have undoubtedly shaped the theology of Anglicans worldwide, and has opened our hearts to a willingness to know and understand one another at a deeper level in order to find reconciliation and peace.

In recent years, members of The Episcopal Church have engaged in intensifying debate over what should be the economic policies and missional approaches of the Church to best address the needs and suffering of both Palestinian and Israeli peoples. We have engaged in fact-finding on both sides of the border, in Gaza, in Jerusalem, and in the West Bank. We have visited with Christian brothers and sisters in Palestinian camps, hospitals, and schools, even as we have witnessed the expansion of settlements and an increase in hostility and conflict in the region.

People of good faith within The Episcopal Church continue to discern differently what the best course of policy and action should be toward resolving the Palestine-Israel conflict and the suffering caused by it. At the best of times, we agree to pursue different courses of personal advocacy and to seek common ways to support mission that alleviates human need. At our worst, we mirror this ancient conflict ourselves, standing across a chasm of disagreement, shouting our deeply held convictions at one another in hope of convincing our “adversaries” to see things according to our own views.

It matters not what the issue is — the ordination of women, full inclusion of LGBT persons in the life of the Church, advocacy and foreign policy regarding Palestine — the Church of God can choose to be a prophetic

light to the world by the way in which we engage those with whom we disagree; or we can mirror the anger, conflict, and hostility of the world.

In this resolution, the Standing Commission for Anglican and International Peace with Justice Concerns does not seek to establish a specific policy for the Office of Government Relations or others to employ toward the Israeli-Palestinian conflict. Rather, it seeks to call our Church to prophetic witness about the love of God and the process of peacemaking. This resolution calls The Episcopal Church to model the tools of dialog, listening, truth-telling, and reconciliation that have been employed in other times to seemingly intractable political issues around the world. This resolution calls for us to engage with deepest intention, to love and understand one another, even as we seek to wrestle with deep differences in the convictions and witness of our own membership toward a political and humanitarian problem of huge proportion and complexity.

#### **4. Regional Issues in Latin America**

Because of the cultural contributions and perspectives of members whose countries of origin are not the United States, the Standing Commission on Anglican and International Peace with Justice Concerns has tended to have a special interest in Province IX of The Episcopal Church. While not wanting to overstep our mandate — which is to address policy and ministry opportunities across the wider Anglican Communion — we naturally recognize the international nature of The Episcopal Church and have inevitably been drawn toward focusing on issues that are unique to those dioceses of our Church that lie geographically in Latin America and elsewhere outside the United States.

During this triennium, the Commission was moved to support the emerging peace process in Colombia, through conversation with the Bishop of Colombia and through prayer. The formal process of truth and reconciliation in Colombia is being uplifted in the region after long years of conflict. The Commission wishes to commend those who engage in the difficult exercise of truth-telling and listening in order to create political and cultural will toward peace, in regions where peace has long been elusive, and in particular where human rights violations or crimes against humanity have occurred.

In October of 2011, as part of this Commission's work for the last triennium, several current members of the Commission traveled to Havana, Cuba to partake of a unique opportunity for exchange. During that trip, The Rev. Devon Anderson, Mr. Ethan Vesly-Flad, The Rev. Isaac Ihasota, Ms. Brenda Hamilton, Bishop Leo Frade, and Bishop Francisco Duque met with The Rt. Rev. Griselda Delgado, Bishop Diocesan of Cuba; and with her staff, with lay leaders of the diocese, with parish ministers, with seminarians and their professors, and with representatives of the Cuban government who oversee the role of religious organizations in Cuban society. The General Convention has long supported ending the US political embargo against Cuba. Feeling that there was yet more we could say to the General Convention as a result of that trip, the Commission offers the following resolution.

##### **A053: STRENGTHEN RELATIONSHIP WITH DIOCESE OF CUBA**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention urge the Office of the Presiding Bishop and the Office of Global Partnerships to take action to continue to strengthen the relationship between The Episcopal Church and La Iglesia Episcopal de Cuba, with the goal of promoting both greater understanding and fellowship between the Anglican Diocese of Cuba and particularly the dioceses of The Episcopal Church located in the United States; and be it further

*Resolved*, That such efforts seek to promote mutual ministry and understanding through cultural exchange, prayer, worship, fellowship, education, and humanitarian work — identifying and facilitating specific opportunities for exchange, including but not limited to international travel so that face-to-face exchange may occur between Cuban and American Episcopalians; and be it further

*Resolved*, That such efforts seek to strengthen and support education and training of lay and clergy leadership for congregational ministry within the Cuban church, specifically by identifying ways to support the Diocesan Center in Havana, whose aim is to provide both training and respite for congregational and diocesan leaders; and be it further

*Resolved*, That organizational bodies and individuals within The Episcopal Church seek to strengthen and support theological education, discernment and preparation of priests, deacons and laity for ministry within the Diocese of Cuba, specifically by creating and fostering opportunities for visiting scholars and others to participate in both live and distance-learning at the seminary level; and be it further

*Resolved*, That the goal of such efforts be to strengthen overall the ability of The Episcopal Church in Cuba to work effectively with both secular and religious or denominational organizations to meet the spiritual and physical needs of the Cuban people; and be it further

*Resolved*, That such efforts seek to promote and strengthen understanding among Episcopalians — especially in the United States — of the role of God’s Church in Cuban society and of the needs to which we can mutually minister; and to benefit and strengthen the faith and vocation of American Christians through relationship with our Cuban counterparts as our nations move cautiously toward a time of more open relationship, reconciliation, and peace after long years of political and cultural conflict or separation.

**EXPLANATION**

Members of the Standing Commission on Anglican and International Peace with Justice Concerns were given the opportunity during the last triennium to travel to Cuba in order to establish greater relationship between the Anglican Diocese of Cuba and The Episcopal Church as it is embodied in North and Latin America. This trip afforded a unique opportunity for lay leadership to interact with one another, given the relaxation of travel restrictions between Cuba and the United States for religious or educational purposes.

While in Havana and in one other local parish outside the city, members of the Standing Commission were able to identify several specific ways in which The Episcopal Church — especially in the United States — could begin to effect a rapprochement between our two nations after long years of political separation and embargo.

The resolves enumerated above indicate several specific ways in which the Anglican Diocese of Cuba and The Episcopal Church in the United States could collaborate to strengthen international relations and to enable the Church in Cuba to minister to the needs of the Cuban people and to prepare for a time of potential political and social transition in relationship to US foreign policy.

**Recommendations for Areas of Focus in Future Work**

As we noted above, the scope of issues that the Commission undertook to study and make recommendations upon is broader in range and complexity than can be dealt with in the course of one triennium’s work by one CCAB, especially given the challenges we experienced not only in convening our membership, but also in engaging with experts in these various fields of study and policy making or with foreign partners in the Anglican Communion.



We would therefore recommend that further work be done in these areas: moral injury and spiritual healing; addressing the roots of religious extremism; advocacy for human rights in the Middle East; human trafficking; and women and global economic development.

In 2015, the UN's focus on the Millennium Development Goals will be replaced with a new plan to continue movement toward the several unmet goals. This Commission should examine that plan to see how The Episcopal Church may contribute to furthering development and reducing extreme poverty in the world.

## Budget

At the time of its report, the Commission had expended \$ 13,856.36 for the costs associated with one face-to-face meeting and Adobe Connect licensing fees. The Commission was budgeted \$17,000 for the current triennium (a decrease of 43 percent over the last triennium). Given the realities of budget cuts for all CCABS, this Commission felt the impact of substantially reduced funding not only through fewer face-to-face meetings of its membership, but also in the elimination of foreign travel altogether.

Given its international mandate, the Commission posits that opportunities for face-to-face relationship-building with counterparts from other Provinces of the Anglican Communion, as well as opportunities for direct observation of conditions and issues in foreign countries that we seek to mutually address, are essential for responsibly carrying out the work that our mandate requires.

For members of a Commission based largely in the United States “to develop recommendations and strategies regarding common ministry opportunities and concerns with other Provinces of the Anglican Communion,” without having representatives be able to visit those Provinces or to enable envoys of those Provinces to visit us, brings into question the validity of those recommendations. At its worst, such an approach runs the risk of perpetuating post-colonial myopathy.

In considering the next triennial budget for this Standing Commission — or whatever body is tasked with international policy work in emerging church structures — this Commission would advocate strongly for a budget that includes international travel for at least some members, and would ask that the various offices of the DFMS work closely with the Commission to coordinate travel and exchange opportunities with those already occurring for other church purposes, so that Commission representatives might accompany pilgrimages and fact-finding missions and might appropriately join meetings with other Anglican partners when hosted in the United States.

The Standing Commission on Anglican and International Peace with Justice Concerns plans to meet face to face twice during the next triennium, and to send at least one representative annually to the UN Conference on the Status of Women. If the Commission were to meet face to face in the first and third years of the triennium, and in the second year focus travel on foreign exchange, then this would require a minimum of \$13,000 for 2016, \$13,000 for 2017, and \$13,000 for 2018, for a total of \$39,000 for the triennium.

# STANDING COMMISSION ON COMMUNICATION AND INFORMATION TECHNOLOGY

## Membership

The Rev. Canon Daniel Webster, *Chair*  
Ms. Robyn Mauldin, *Vice Chair*, 2018  
Ms. Melodie Woerman, *Secretary*, 2015  
Mr. Benjamin (Bungee) Bynum  
Mr. Miguel Escobar, 2018  
The Rev. Edgar Giraldo, 2018  
Mr. Bill Joseph, 2018  
The Rt. Rev. Greg Rickel  
Canon Heidi Shott, 2015  
The Rt. Rev. Kirk Smith, 2015  
The Rev. Richard (Dick) Snyder

Appointed as Executive Council liaison was Ms. Liza Anderson, Connecticut, I. Appointed as representative of the President of the House of Deputies was The Rev. Lester Mackenzie, Los Angeles, VIII. Serving as staff liaison was Mrs. Anne Rudig, Director of Communication for The Episcopal Church.

### *Changes in Membership*

Bishop Rickel resigned in 2012 due to obligations with other commissions. Mr. Bynum resigned in 2012 due to his move outside the United States. Father Snyder and Father Webster resigned in 2013 due to other commitments. They were replaced by these members:

- Ms. Holly Behre, South Carolina, IV, 2015
- The Rev. Torey Lightcap, Iowa, VI, 2015
- The Rev. Lester Mackenzie, Los Angeles, VIII, 2015
- The Rt. Rev. Santosh Marray, Alabama, IV, 2018

Ms. Woerman was elected to serve as chair following Father Webster's resignation, and Ms. Behre was elected to serve as secretary in Ms. Woerman's place.

### *Representation at General Convention*

Bishop Kirk Smith and Deputy Bill Joseph are authorized to receive non-substantive amendments to this report during General Convention.

## Summary of Work

**Mandate:** To identify, study, and recommend to General Convention communication strategies, policies, priorities, and technologies to strengthen the Church's communication of the Gospel and the mission of the Church to the world at large and to improve information management and exchange within The Episcopal Church.

**Meetings:** The Commission has met 11 times since it was formed in November 2012; one meeting was in-person, and 10 meetings were via telephone conference call or video web conference:

- November 12-15, 2012, in-person (joint meeting of all CCABs), St. Louis
- Feb. 24, 2013, telephone/web conference
- March 19, 2013, telephone/web conference
- July 16, 2013, telephone/web conference
- Aug. 13, 2013, telephone/web conference
- Sept. 17, 2013, telephone/web conference
- Dec. 17, 2013, telephone/web conference
- March 18, 2014, telephone/web conference
- June 17, 2014, telephone/web conference
- July 15, 2014, telephone/web conference
- Sept. 16, 2014, telephone/web conference

**RESOLUTIONS**

*Referred resolutions:* There were no resolutions referred to this Commission by the 77th General Convention.

*Proposed resolutions:* The Commission is proposing one resolution for consideration by the 78th General Convention.

**A010: DISSOLVE THE STANDING COMMISSION ON COMMUNICATION AND INFORMATION TECHNOLOGY**

*Resolved,* the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church dissolve the Standing Commission on Communication and Information Technology or incorporate its charge with that of another standing body of The Episcopal Church.

**EXPLANATION**

Created by the 73rd General Convention in 2000, the Standing Commission on Communication and Information Technology was formed at a time of great changes in technology. It was also formed just as the first Director of Communication was hired at the Episcopal Church Center. For many years prior to 2000, Episcopal News Service, Episcopal Life, information-technology staff, and the Presiding Bishop’s communications and public affairs staff operated with a good deal of independence of one another.

With an evolving staff structure in the Office of Communication emerging just as SCCIT began to tackle its charge, the roles, expectations, and relationships between the two entities were never fully defined.

Over the past 14 years, the fields of communications and technology have experienced a period of exponential change and growth. The three-year cycle of General Convention renders any recommendation that SCCIT might make obsolete within months of passage. Despite the talent, enthusiasm, creativity, and faithfulness of the members of SCCIT, such a far-flung group of volunteers lacks the capacity to achieve recommendations without program support.

Therefore, SCCIT’s members recommend the dissolution of the Commission so that its members may be free to share their gifts and energy in immediate and local projects within existing Episcopal networks.

### **The Changing Nature of Communications in the Episcopal Church**

Each member of the Episcopal Church's Standing Commission on Communication and Information Technology (SCCIT) is keenly aware of the variety of communication challenges facing The Episcopal Church. We need affordable and sustainable Church website development and support, mastery of social media best practices, and congregational development resources, including a rapidly growing need for Spanish-language resources. The need for such offerings is real and urgent. Indeed, the chance to assist in helping to provide them to the wider Church is, in fact, why many of the Commission members sought or agreed to serve on SCCIT.

What has become clear over the course of the triennium, however, is that SCCIT is not equipped or capable of addressing these challenges in any significant or meaningful way. Put simply, a standing commission is the wrong tool for this particular job.

The General Convention in 2012 reflected this in many respects in that, despite myriad communication challenges facing the Church, it did not send a single resolution to SCCIT to work on in this triennium. Those responsible for setting budgets also determined that the Commission required only the minimum amount of financial resources needed to meet in online sessions. While online meetings are effective and low-cost, occasional face-to-face meetings are also important to aid any group's cohesion and productivity.

Even without resolutions to work on, SCCIT has continued to meet quarterly and, over time, explored the relevance of our mandate. As a policy-focused commission, SCCIT's aim is to propose policy changes regarding communications, a mandate that makes less and less sense for several reasons:

- The field of communications is changing rapidly. Policy statements about current trends in communications today will be outmoded within a year or, likely, less.
- There is no church-wide office that would help dioceses and congregations realize policy recommendations that SCCIT might make. In the absence of such an office, the prior triennium's commission turned its attention from policy-making to the creation of a resource website to support its "Website Challenge." However, this website quickly became out-of-date without committed volunteers or program staff to support it.

Without exaggeration, the members of SCCIT find themselves without a clear sense of purpose, without adequate resources, and stymied by the very nature and scope of the work. As General Convention 2015 approaches, we face the unsettling prospect of another three years of meeting for the sake of having said we met. SCCIT sees a greater likelihood for innovation and support in the areas of communication as coming from the Episcopal Communicators network, in partnership with The Episcopal Church's Office of Communication; as well as from the work of innovative individuals and organizations that are pushing at the boundaries of The Episcopal Church's communication efforts in timely and innovative ways.

Indeed, the highly successful Social Media Sunday, held on June 29, 2014, was a grassroots effort started by web and social media volunteer Laura Leist Catalano of the Diocese of Missouri, who also created <http://www.episcopalshare.org>. Laura reported that *"there were 4,000+ posts on Twitter and Instagram and thousands more on Facebook. With monitoring tools, we estimated that we reached one million-plus on Twitter alone, and imagine there were millions more on Facebook! At approximately 10am EST we hit the top of the US Trends chart on Twitter."*

The Episcopal Church Foundation's Vital Practices blog, <http://www.ecfvp.org>, and social media presence offer many resources to support local efforts in Church communications and other areas of congregational development.

We commend the work of the Virginia Theological Seminary for its development of the e-Formation Conference in 2013 and 2014, which offered Christian educators across the Church the ability to participate from afar and still access excellent resources.

The Episcopal Church has many communication challenges that will require the creativity and coordination of individual communicators — paid staff at the local and diocesan level; Episcopalians willing to volunteer their time, expertise, and talents to improving communications efforts; and the staff of the Office of Communication. Does SCCIT have a role to play? After two years of meeting both in person and online — with no resolutions from 2012, no budget, and a mandate focused on policy-making (with no capacity to achieve the recommendations we might propose) — the members of SCCIT are convinced that a commission is not the best means by which to tackle challenges effectively, nor does it represent a good use of limited resources.

We therefore recommend that the General Convention dissolve this Commission or merge it with another standing body.

## Budget

The Commission received a budget of \$5,000 from Executive Council for the triennium. Because the only requested expense was for one in-person meeting, and it was not possible to accomplish this on the amount allocated, the Commission had no expenses during this triennium.

Online meetings via WebEx were hosted at no charge by the Diocese of Maine.

Based on the Commission's recommendation in its proposed resolution, the Standing Commission on Communication and Information Technology will not exist during the next triennium and thus will require no budget.

# STANDING COMMISSION ON CONSTITUTION AND CANONS

## Membership

Mr. William Cathcart, Esq., *Chair*, 2015  
Mr. James Simon, Esq., *Vice Chair*, 2018  
Mr. Marcellus Smith, *Secretary*, 2015  
The Rt. Rev. Laura Ahrens, 2018  
The Very Rev. Walter Brownridge, 2015  
Mr. Henry Burt, Esq., 2018  
The Rev. Megan Castellan, 2018  
Ms. Pauline Getz, Esq., 2018  
The Rt. Rev. Dorsey Henderson, Jr., 2015  
The Rt. Rev. Herman Hollerith, 2018  
Ms. Kathleen Wells, Esq., 2015  
The Rev. Canon Bradley Wirth, 2018  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. Stan Runnels, *Executive Council Liaison*  
Ms. Dorothy-Jane Porpeggia, Esq.,  
*President of the House of Deputies Liaison*  
Ms. Mary Kostel, Esq., *Staff*

### *Representation at General Convention*

Bishop Dorsey Henderson, Jr. and The Rev. Canon Bradley Wirth are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** The canonical mandate of the Commission is as follows:

### CANON 1.1.2(n)

- (3) A Standing Commission on Constitution and Canons. It shall be the duty of the Commission to:
  - (i) Review such proposed amendments to the Constitution and Canons as may be submitted to the Commission, placing each such proposed amendment in proper Constitutional or Canonical form including all amendments necessary to effect the proposed change. The Commission shall express its views with respect to the substance of any such proposal only to the proponent thereof; Provided, however, that no member of the Commission shall, by reason of membership, be deemed to be disabled from expressing, before a Legislative Committee or on the floor of the House of membership, personal views with respect to the substance of any such proposed amendment.
  - (ii) Conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity, and on the basis of such a review propose to the General Convention such technical amendments to the Constitution and Canons as in the opinion of the Commission are necessary or desirable in order to achieve such consistency and clarity without altering the substance of any Constitutional and Canonical provisions; *Provided, however*, that the Commission shall propose, for the consideration of the appropriate Legislative Committees of the two Houses, such amendments to the Constitution and Canons as in the opinion of the Commission are technically desirable but involve a substantive alteration of a Constitutional or Canonical provision.

(iii) On the basis of such review suggest to the Executive Council and the Domestic and Foreign Missionary Society such amendments to their respective By-laws as in the opinion of the Commission are necessary or desirable in order to conform the same to the Constitution and Canons.

(iv) Conduct a continuing and comprehensive review and update of the authorized “Annotated Constitution and Canons for the Government of the Protestant Episcopal Church in the United States of America otherwise known as the Episcopal Church” to reflect actions of General Convention which amend the Constitution and Canons and, in the discretion of the Commission, develop other materials which are appropriate for the purpose of the “Annotated Constitution and Canons,” and facilitate the publication of this document and related materials. The Commission may provide or support forums to promote commentary, discussion, and understanding of the Constitution and Canons.

(v) Discharge such other duties as shall from time to time be assigned by the General Convention.

In undertaking its work, the Commission strove to keep its study and deliberations within the bounds of its canonical mandate and to refrain from judicial interpretation of the Constitution and Canons, in accordance with the limitations expressed in its authority and duties assigned by Canon I.1.2(n)(3).

### **Meetings**

The Standing Commission on Constitution and Canons met in St. Louis, Missouri in November 2012; in Baltimore, Maryland in February 2014; and in Salt Lake City, Utah in October 2014.

In addition, the Commission met via telephone conference call 17 times: in April 2013, May 2013, July 2013, August 2013, October 2013, April 2014, May 2014, June 2014, July 2014, August 2014, September 2014, twice in October 2014, twice in November 2014, and once in December 2014.

At its organizational meeting, the Commission elected William Cathcart as its Chair; James Simon as its Vice Chair; and Marcellus Smith as its Secretary. At its initial meeting and in subsequent meetings, the Commission received comments and took action as reflected in this report. For detailed accounts of the Commission’s proceedings, readers are referred to the minutes of the Commission’s meetings, available at the Commission’s web page on the General Convention website.

### **Specific Areas of Work**

#### **1. Review of Canon I.1 and Other Relevant Canons and Rules of Order Regarding the Secretary of Convention and the Secretary of the House of Deputies**

As part of its canonical mandate to “conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity,” the Commission concluded that the canonically assigned roles and responsibilities of the Secretary of the House of Deputies and the Secretary of the General Convention required clarification.

By way of background, as the 2012-14 Triennium was beginning, one of the tasks that needed to be undertaken was the hiring of a new Secretary of the General Convention. A small subcommittee of the Executive Council was appointed to assist the presiding officers in interviewing the pool of applicants for this position. As the subcommittee was doing its work, it became evident that some of the practices of the General Convention regarding the positions of the Secretary of the House of Deputies and the Secretary of the General Convention were inconsistent with the language of the Canons.

Moreover, some of the canonically assigned duties and responsibilities for each position seemed to be impractically assigned to the opposite office. The canonical amendments recommended below are

intended to clarify and consistently realign each office and to ensure that the roles and responsibilities of each are properly assigned to each Secretary.

## **2. Revision of Title III: Return to Ordained Ministry of Deacons, Priests, and Bishops Previously Removed and Released**

As part of the Commission's mandate to "conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity," the Commission concluded that although Canons III.7, III.9, and III.12 provide for the release and removal of Deacons, Priests, and Bishops from the ordained Ministry of this Church, there is no consistent canonical process by which those persons can return to that Ministry. Many dioceses have created their own *ad hoc* processes to address this issue. However, these processes have lacked canonical consistency and have given rise to confusion within dioceses faced with members of the clergy seeking to return to ordained Ministry in this Church.

Accordingly, the Commission sought input from diocesan chancellors, from the House of Bishops, and from clergy and laity; and also reviewed *ad hoc* procedures created by dioceses to address this issue. Through our research, it became clear that any canon by which Deacons, Priests, and Bishops who have been released and removed from ordained Ministry in the Church and might return to that Ministry would need to balance a desire to reconcile those seeking to return to the ordained Ministry in this Church with the gravity of the decisions both to leave the ordained Ministry in this Church and to seek to return to it.

Thus, three elements emerged as central for any canon by which Bishops, Priests or Deacons could return to ordained Ministry within the Church:

- (1) A proven call from the community, as evidenced by support from members of the candidate's own order of ministry;
- (2) The consent of the Bishop of the diocese in which the candidate was last canonically resident; and
- (3) An agreement to undergo such testing or other examination as the consenting Bishop would deem appropriate.

The Commission has drafted proposed canons that aim to incorporate each of these elements. These draft canons, which appear later in this report, would provide a "return process" that essentially reverses the existing release and removal process. Accordingly, we recommend that notice of return to ordained Ministry be provided in the same manner as notice of release and removal. Further, we recommend placement of each applicable canon after the canon relating to release and removal for each particular order of Ministry.

## **3. Review of Canon III.11.3(a): Election of Bishops**

As part of its canonical mandate to "conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity," the Commission discovered that Canon III. 11.3(a), addressing the transmission of required information upon election of a Bishop, contains a referencing error as the result of a recent amendment. The Canon was amended in 2012, and sections were renumbered.

Before it was amended, the documents required to be sent to the Presiding Bishop had been described in Section 3(b) of the Canon. In the amended Canon, they are described in Section 3(a). However, later in Section 3(a), the current Canon incorrectly refers to documents described in Section 3(b) (when in fact they are now described in 3(a)). The suggested revision is included at the end of this Blue Book report.



#### 4. Work on Preparation and Supplement to White & Dykman

The 75th General Convention adopted Resolution A023, adding to the Commission's mandate the "continuing and comprehensive review and update" of the Annotated Constitution and Canons (popularly known as "White & Dykman"). Pursuant to A023, and continuing its work from the last triennium, the 2009-2012 Commission continued to consider new ways to approach updates of Titles III and IV, as wholesale changes (2003 and 1994, respectively) are not conducive to the conventional White & Dykman serial, section-by-section revision commentary method.

In the 2012 *Blue Book*, the Commission committed to hosting a meeting in January or February 2012 with key individuals who were involved in drafting the 1994 and 2009 revisions to Title IV along with several proficient and talented drafters who would be charged with making headway in following a prescribed methodology for beginning the new Title IV Supplement. This meeting was held as planned on June 11-13, 2012, and a subcommittee was formed, composed of the following: Diane E. Sammons, Esq., Chair; Joan Geiszler-Ludlum, Esq., Vice Chair; The Rt. Rev. Dorsey Henderson, Jr.; Lawrence Hitt, II, Esq.; William Cathcart, Esq.; Stephen Hutchinson, Esq.; Sally Johnson, Esq.; Thomas Little, Esq.; and Mark Duffy.

The Subcommittee has held 10 Adobe Connect Conference calls thus far during the triennium as follows: April 3, 2012; June 25, 2013; September 17, 2013; November 10, 2013; December 4, 2013; January 21, 2014; March 25, 2014; April 21, 2014; October 15, 2014; and November 12, 2014.

During this triennium, the Subcommittee has formed four separate groups: a) the 1994-2000 Title IV Revision; b) the 2001-2012 Title IV Revision; c) the Case Law Group; and d) Process for Future Annotations. Each of the Title IV Groups has completed its outline for the completion of the supplement, and work is well underway for completion. An editorial process has been agreed to for comment and revision. The Case Law Group is well-engaged in the process of collecting a record of each and every trial under Title IV since 1994. The work will continue with a summary of key legal issues for each case.

Finally, the Process for Future Annotations Group has come up with a draft plan for continuing the annotation process on a triennium basis moving forward. The White & Dykman Subcommittee proposes that the Commission allow it to complete its work as part of the formation of the next Commission.

#### 5. Resolutions Referred to the Commission by General Convention and Others

##### A. Resolution 2012-A066: Impairment of a Member of the Clergy

This resolution proposed adding a new Canon III.9.14 that would require and authorize Bishops to take certain actions, in some instances with the participation of the Standing Committee, with regard to a clergy person who is considered to be "severely impaired."

After consideration of the proposal and consultation with its proponents, the Commission reached three conclusions. First, while it understood the grave situation that exists when an impaired clergy person continues to function as rector of a congregation, and the harm that can result, the Commission determined that the canonical change proposed by A066 contained problematic ambiguity in its terms as well as possible contradictions with other canons, raising questions about whether the proposal protected the due process of clergy persons thought to be impaired.

Second, costs to the diocese and to clergy persons thought to be impaired were not addressed by A066. Finally, it is the Commission's view that current Canon IV.7 providing for Pastoral Direction to a Member of the Clergy can be used to address the situation of an impaired clergy person sufficiently. To that end, the Commission chose not to present A066 or an amended variation of it to the 78th General Convention.

**B. Resolution 2012-A142: Study Expansion of Canonical Residency**

This Resolution was referred to Executive Council, the Standing Commission on Constitution and Canons, the Standing Commission on Ministry Development, and the Office of Transition Ministry to study the needs and merits of expanding Canonical Residency to Clergy not in charge of congregations and to report to the 78th General Convention.

The process for becoming canonically resident in a diocese is set forth in Canon III.7.6(b) for Deacons and Canon III.9.4 for Priests. The parallel Canons call for “Letters Dimissory” to be issued by the Ecclesiastical Authority of the Diocese of current canonical residence. Canon III.9.4(d) requires the Ecclesiastical Authority of the Diocese to which the transfer is proposed to accept the Letters Dimissory within three months, unless credible information is received concerning the character or behavior of the Priest. There is no time requirement for the acceptance of Letters Dimissory for clergy who are not called to a cure.

The Commission was prepared to propose canonical changes relating to the acceptance of Letters Dimissory after receiving guidance from Executive Council, the Standing Commission on Ministry Development, and the Office of Transition Ministry. As the Commission did not receive information from any other body, it determined that it would take no action on this Resolution.

**C. Resolution 2012-Co49: Study and Revise Title IV****1. Title IV Review**

In 2013 the Commission conducted a church-wide survey seeking feedback on how the 2009 Title IV amendments are working in actual disciplinary proceedings. This survey was transmitted to the Bishops and Chancellors of the Church, who were asked both to submit their own comments and to relay the Commission’s request for comments to anyone who might be interested in providing comment about Title IV. The Commission is very grateful to all who responded; we received more than 100 thoughtful and well-documented suggestions and insights.

The general complaints from those who have worked in the system were that the Title IV process often takes too long and costs too much money; that church officials are often uncertain of their authority and duties; and that Respondents are often permitted to disrupt and delay the process, causing significant additional pastoral harm to Complainants, Injured Parties, and entire congregations that are held in limbo without effective resolution and closure.

After a careful review of each issue raised, The Commission determined that in most cases, the problems described were the result of inadequate training in the Title IV process, not in the canonical process itself. As a result, for 2015-2018, the Commission seeks funding and proposes a plan to develop and implement a church-wide training program composed of online modules and offline written materials for all members of the clergy and for all persons holding Title IV offices, as well as for all others in the Church community who have Title IV questions.

The Commission also proposes and is establishing a panel of experts (to be referred to as the Title IV Resource Team) who can answer technical questions about the Title IV process. It is our hope that with better training and more resources, the system will work more efficiently and pastorally, as it was designed to do.

The Commission also identified areas in which the canons would benefit from fine-tuning. In response to the many helpful suggestions received from across the Church, the Commission proposes amendment to, or addition of, 25 canons, with changes focused on clarifying the duties of Title IV officials and

promoting a more efficient, pastoral, and accountable process for all parties affected by Title IV. Suggested changes include:

- Adding more definite timelines to most processes;
- Adding sanctions for disruption of the process;
- Clarifying the boundaries of authority related to key participants;
- Streamlining the discovery process and clarifying the types and amount of discovery required and permitted by each side; and
- Clarifying who has responsibility for monitoring various aspects of the Title IV process.

The Commission considered eliminating the Conference Panel altogether from the Title IV process, on the ground that that phase of the process seems prone to consuming valuable time with little productive result. After consultation with the Episcopal Chancellors Network, however, we concluded that it is too soon after the adoption of the new Title IV to assess the effectiveness of the Conference Panel process at expanding the resolution of disciplinary matters through non-litigious means.

In the meantime, the Commission proposes more strict timelines and monitoring mechanisms in the Conference Panel process in order to help focus its important work. It is hoped that we can monitor and better measure the success of this process in the next triennium.

The Commission remains grateful to the hard work of those who served on the Title IV Task Force(s) and who offered to the Church a workable vision of a more pastoral, restorative model for ecclesiastical discipline. Our efforts during this triennium to evaluate or tweak their hard work is not a criticism of their work product, but instead an effort to honor that work by offering fixes for the small problems that real-life implementation has revealed.

## **2. Title IV Training Project**

### **Project Scope:**

At present, the Commission envisions training to be divided into three components: (1) a Title IV Resource Team; (2) written training materials to include but not necessarily be limited to narratives, PowerPoint presentations, and FAQs; and (3) online training modules. We hope to have the Title IV Resource Team in place by the end of 2014, and the written and online materials by the end of 2015. The Commission envisions utilizing press releases, email distribution lists, and two or three Provincial events (potentially at seminaries) to announce and kick off the launch of the training materials and modules.

#### **A. Resource Team:**

The Title IV Resource Team will help guide individuals throughout the Church in navigating Title IV. This team will NOT be an extension of the Chancellors Network and will NOT provide legal advice. Instead, it will be composed of non-lawyers (Bishops, Canons to the Ordinary, etc.) and lawyers alike who are familiar with the new Title IV.

The group will respond to inquiries, but will not answer substantive questions (i.e., “Is this an offense?” would be answered in the manner of, “You should consult the following canons ... Additionally, you may wish to contact John Smith in the Diocese of ABC as they have previously handled a similar Title IV matter” — the latter part only being appropriate if it is already public knowledge).

Questions would be sent to a publicized email address and then would be picked up by the team member designated to handle the email for the particular day (we envision each person on the team monitoring the email a few days per month). The person picking up the email could then either

prepare a reply or refer it to another team member whom he or she believes may be better equipped to handle the response. All responses would be signed, “Title IV Resource Team” so that people sending inquiries could not be guaranteed a response from a particular team member. We are looking into setting up a confidential Listserv for the team members to use to communicate with each other.

#### B. Written Materials & Online Materials:

At present, the Commission proposes that the written and online materials will cover as many as 23 topics, with subtopics included (see Subsection H below). The training would focus on discipline related to priests and deacons only, and would not specifically address the Title IV provisions uniquely applicable to the discipline of Bishops, although in many respects the information provided would apply equally in that scenario. These topics are pared down from an initial possible list of 38 topics, with numerous subtopics that, in a list, covered 10 pages (see Subsection G below). Additional topics could be covered as budget and other resources allow. The list may grow in response to inquiries received from the church-wide community or as written materials developed in connection with the project demonstrate a need for greater training in a particular area.

The Commission has identified that certain topics would be best presented in a question-and-answer format through use of Frequently Asked Questions. Many of the FAQs are already in the process of development through the work the Commission has completed during the triennium. Members of the Commission’s Subcommittee on Title IV training are continuing to develop the FAQs for use as part of the training materials.

The Commission envisions that online modules will be supplemented by PowerPoint presentations and additional written materials relevant to the topics addressed in the module.

The Title IV training Subcommittee of the Commission will reach out to members of the Resource Team as well as to others throughout the Church to obtain written materials that will be helpful for use in developing consistent written materials for distribution and use throughout the Church.

Once those materials have been compiled, the Subcommittee will seek volunteers to assist in writing the materials. Consistency and clarity will be key in preparing the written materials across the different topics. The Commission will also seek assistance from individuals with and without legal backgrounds to ensure both canonical compliance as well as readability and simplicity of language. We fully recognize the importance of ensuring that all those involved in Title IV matters be able to understand their obligations under the Canon.

The Commission has considered a variety of options at all different budget levels for the creation of training materials. At present, it appears a reasonable estimate for quality production would be through the Diocese of Utah at a rate of \$7,500 per hour of video (including up and online) in present-day dollars. As production will not occur until at least late 2015, this number will need to be adjusted upwards for inflation. This would include the costs of production, shooting, and helping to clean up the written materials for the video; plus hosting the website, presentation, and video. The Commission also would have to factor in additional costs for translation (approximately 18 cents per word per language in present-day value) and travel costs for presenters. There may be additional costs.

Less costly options are available but, in the Commission’s view, they would compromise quality, would decrease consistency across the project — thereby possibly even increasing confusion about Title IV — would delay the project, and would require significant additional volunteer personnel.

### C. Method of Training:

The Commission proposes the creation of training modules to be presented in an online format that is available for viewing by anyone who wishes to view them. Each module will be designed to cover a discrete topic or related topics, and to be of a reasonable length so as to make the training sessions manageable for those who need questions answered in a timely manner. This project design was selected for both ease of use and cost-effective modification purposes.

The Commission firmly believes that, as revisions to Title IV arise, this method will allow for quick, useful, and cost-effective updated training to be provided church-wide. Furthermore, the modules will be easily translated into other languages. Finally, the Commission envisions using trainers and professional presenters, as well as written materials, which are able to engage a diverse online audience through various learning styles and needs (i.e., auditory and visual).

### D. Justifications:

1. There is an immediate need for training under the new Title IV.
2. For years, the entire church-wide community has been asking General Convention, Executive Council, and other church officers for training, guidance, and assistance in navigating Title IV.
3. Diocese and Provinces lack the resources and, in some cases, the knowledge and experience to provide consistent and immediate training to all involved in the Title IV processes.
4. Seminarians are not receiving adequate — or in some cases, any — education in Title IV. As a result, many priests are wholly unaware of the standards to which they are being held and the disciplinary process that governs them. Once created, the training modules could provide seminarians with reliable teaching tools that could easily be incorporated into existing curricula at little or no cost to the institutions.
5. Once created, the online modules will be easier and more cost-effective to update than traditional training, thereby allowing for more immediate training updates following changes to Title IV.
6. The better the information that can be provided to all involved in the Title IV process, the more cost-effective the process can be for all involved. A single Title IV matter can cost dioceses and clergy tens, if not hundreds, of thousands of dollars in litigation costs. Chancellors estimate that lack of training significantly increases the cost of litigation, by estimates as high as 30-50 percent. Further, a poorly handled Title IV matter can cause unnecessary — and often irreparable — harm to both relationships and reputations of all parties involved. The Church has a responsibility to remediate any unnecessary costs, both relational and financial. Consistent and quality upfront training can greatly assist in this regard.
7. By adding the Resource Team in addition to the written materials and online training modules, the Commission will provide a reliable source of knowledgeable people to whom those with Title IV questions may go, thereby increasing consistency in the application of Title IV across the Church, and decreasing the pressure and reliance on those few chancellors upon whom to date many have come to rely.
8. More harm to the Church can flow from the mismanagement of a claim than from the misconduct itself. The training should be viewed as an investment in a savings plan rather than as an unnecessary and unwanted cost.

E. Calculations Used in Arriving at Budget Requests:

1. Online Training Modules:

Present-Day Cost per Module: \$7,500

Number of Modules: 23

$$\$7,500 \times 23 = \$172,500$$

Adjusted upward to \$8,500 per module for inflation, as production will not occur until at least late 2015

$$\$8,500 \times 23 = \$195,000$$

Estimate for 10 additional topics/“overage” to need to be covered based upon issues identified as “need for training”

$$\$8,500 \times 10 = \$85,000$$

195,000

+85,000

\$280,500

2. Translation of Speaking Portion of Online Training Module:

The Commission estimates that translation of the “speaking part” of each module into one language will cost \$29,700. For translation into more than one language, that number will need to be multiplied by the number of languages into which the script will be translated.

Given the policy of the Church, the Commission’s proposed budget encompasses an allocation for translation into both Spanish and Creole. Of course, these are preliminary estimates only, as no written materials have yet been prepared. The numbers are based on the following assumptions:

9,000 words per hour module (150 words spoken per minute) x

\$0.18 per word = \$1,620

\$1,620 x 23 original modules = \$37,260

\$1,620 x 10 overage modules = \$16,200

37,260

+ 16,200

\$ 53,460

x 2 (Spanish and Creole)

\$106,920

3. Translation of Written Materials:

The Commission estimates that the written materials in support of each online video module would be 15 pages. At an estimate of 500 words per page, this yields an estimate of 7,500 words per module of written materials to be translated.

7,500 x \$0.18 = \$1350 per module  
 \$1350 x 23 (original) = \$31,050  
 \$1350 x 10 (overage) = \$13,500

31,050  
+13,500  
 x 2 (Spanish and Creole)  
 \$89,100

4. Translation of Written Materials Not Part of Modules (e.g., FAQs):

Estimate of 10 pages of FAQs at 500 words per page  
 5,000 words x \$0.18 = \$900  
 \$ 900  
 x 2 (Spanish and Creole)  
 \$1,800

Miscellaneous Translation Costs (e.g., announcements about project, introductory materials, additional written materials)

Estimate of 150 pages at 500 words per page:  
 75,000 words x \$0.18 = \$13,500  
 \$13,500  
 x 2 (Spanish and Creole)  
 \$27,000

5. Travel Costs for Presenters Associated with Salt Lake Filming:

Estimate of 5 presenters (no one speaker presenting more than 5 topics)  
 \$500/module stipend + travel

23 original modules x 500 = \$11,500	\$11,500
10 overage modules x 500 = \$5,000	5,000
Travel (air + hotel + food):	
Hotel \$100/night (4 nights per person)	
\$400 x 5 = \$2,000	2,000
Airfare \$800 / flight =	
\$800 x 5 = \$4,000	4,000
Meals etc. \$61/day (based on GSA website per extranet travel guidance for Salt Lake City)	
\$61 x 4 x 5 = \$1,220	1,220
<b>Total</b>	<b><u>\$23,720</u></b>

6. Budget for Resource Team:

At this time, the Commission is exploring “no-cost” options for hosting the communications mechanism for the Team. The Commission is hopeful that one of these options will come to fruition. Recognizing, however, both the value the Resource Team brings to the training component of Title IV and the sensitivity of Title IV matters, it will be essential that members of the Resource Team be able to communicate with each other in a timely and discreet manner.

Furthermore, a need has been expressed for their work to be memorialized for use by future Resource Team members. This will aid in the consistent application of Title IV. Toward that end, in the event that a cost-free alternative is not soon made available, to ensure no further delays in the launch of this already identified group of volunteers, the Commission requests that a budget of up to \$10,000 be immediately allocated for their work.

7. Miscellaneous:

Although the Commission has in good faith tried to anticipate all expenses reasonably anticipated to arise in connection with the launch of the training materials, as with any project, it is likely there will be some unanticipated costs. Toward that end, the Commission is requesting an allocation for miscellaneous expenses for \$25,000.

To the extent that these funds are not otherwise utilized in the primary launch of the project during the triennium, the Commission would use them to host training launch events in strategically identified locations throughout the country, likely at seminaries in different Provinces. To the extent that the Church wishes additional presentations to occur (i.e., guaranteed Provincial events in each of the 9 Provinces), additional funds would need to be allocated for such purposes.

F. SUMMARY OF BUDGET REQUEST

BASIC BUDGET REQUEST

Online Training Modules (para. 1)	\$280,500
Travel for Presenters (para. 5)	\$23,700
Resource Team Budget (para. 6)	\$10,000
Miscellaneous (para. 7)	<u>\$25,000</u>
SUBTOTAL	\$339,200

TRANSLATION BUDGET REQUEST

Translation of Modules Referenced in para. 1 (para. 2)	\$106,920
Translation of Written Materials Part of Video Modules (para. 3)	\$89,100
Translation of Written Materials Not Part of Video Modules (para. 4)	\$1,800
	<u>\$27,000</u>
SUBTOTAL	\$224,820

TOTAL: \$339,200 + \$224,820 = \$564,020

The Commission has already reached out to various Title IV experts throughout the Church to ascertain interest in serving an inaugural Title IV Resource Team. The Commission is pleased to report that, at present, more than one dozen such individuals have agreed to serve. At capacity, the group will be composed of approximately 12 to 20 volunteers. Already, these individuals include Bishops, Canons to the Ordinary, Chancellors, Priests, and others. As is the Church itself, this body is geographically diverse and includes a representative from Province IX fluent in both Spanish and English.

G. Preliminary List of Topics That Could Have Been Included in Title IV Training (before cut down)

1. General Definitions/Glossary
  - a) Accord
  - b) Administrative Leave



- c) Advisor
- d) Bishop Diocesan
- e) Chancellor
- f) Church Attorney
- g) Clear and Convincing
- h) Community
- i) Complainant
- j) Conciliator
- k) Conduct Unbecoming a Member of the Clergy
- l) Conference Panel
- m) Disciplinary Board
- n) Discipline of the Church
- o) Doctrine
- p) General Convention
- q) Hearing Panel
- r) House of Bishops
- s) Injured Person
- t) Intake Officer
- u) Investigator
- v) Member of the Clergy
- w) Offense
- x) Order
- y) Pastoral Directions
- z) Pastoral Relationship
- aa) Presiding Bishop
- bb) Privileged Communication
- cc) Promptly (IV.19.8)
- dd) Provincial Court of Review
- ee) Quorum (IV.19.9)
- ff) Reference Panel
- gg) Respondent
- hh) Sentence
- ii) Sexual Abuse
- jj) Sexual Behavior
- kk) Sexual Misconduct
- ll) Standing Committee
- mm) Without Delay (IV.19.8)

2. Identification of Players Involved in Title IV Process

- a) Advisor
- b) Church Attorney
- c) Complainant
- d) Conciliator
- e) Conference Panel
- f) Disciplinary Panel
- g) Disciplinary Board
- h) Hearing Panel
- i) Injured Person
- j) Intake Officer

- k) Investigator
- l) Member of the Clergy
- m) Provincial Court of Review
- n) Reference Panel
- o) Respondent
- p) Bishop Diocesan
- q) Chancellor
- r) Presiding Bishop
- s) Standing Committee
- t) House of Bishops
- u) General Convention
- v) Confidential Communication (and exception(s))

### 3. Rights of Each Player

- a) Advisor
- b) Church Attorney
- c) Complainant
- d) Conciliator
- e) Conference Panel
- f) Disciplinary Panel
- g) Disciplinary Board
- h) Hearing Panel
- i) Injured Person
- j) Intake Officer
- k) Investigator
- l) Member of the Clergy
- m) Provincial Court of Review
- n) Reference Panel
- o) Respondent
- p) Bishop Diocesan
- q) Chancellor
- r) Presiding Bishop
- s) Standing Committee
- t) House of Bishops
- u) General Convention

### 4. Responsibilities of Each Player

- a) Advisor
- b) Church Attorney
- c) Complainant
- d) Conciliator
- e) Conference Panel
- f) Disciplinary Panel
- g) Disciplinary Board
- h) Hearing Panel
- i) Injured Person
- j) Intake Officer
- k) Investigator
- l) Member of the Clergy

- m) Provincial Court of Review
- n) Reference Panel
- o) Respondent
- p) Bishop Diocesan
- q) Chancellor
- r) Presiding Bishop
- s) Standing Committee
- t) House of Bishops
- u) General Convention

5. Qualifications of Each Player/Eligibility to Serve

- a) Advisor
- b) Church Attorney
- c) Conciliator
- d) Conference Panel
- e) Disciplinary Panel
- f) Disciplinary Board
- g) Hearing Panel
- h) Intake Officer
- i) Investigator
- j) Provincial Court of Review
- k) Reference Panel
- l) Disciplinary Board for Title IV Matters Involving Bishops
- m) Court of Review for Title IV Matters Involving Bishops

6. Outline of Process / Flow Chart Form

7. Summary of All Time Periods Applicable Throughout Process

8. Summary of Requirements for Objections at All Steps Throughout Process

9. Summary of Requirements for Notice at All Steps Throughout Process

10. Summary of What is Kept Private vs. What is Kept Public Throughout Process

11. Who Must Receive Which Documents Throughout Process

12. Who Must Sign Which Documents Throughout Process

13. Evidentiary Standards & Which Party Has Burden

14. Costs/Allocation of Costs at Each Step of Process

15. Resources Available for Assistance

- a) From Diocese
- b) From Province
- c) From 815
- d) From Archives
- e) From Chancellors Network
- f) From Other Sources

16. Diocesan Responsibilities

- a) Creation of Disciplinary Board
  - i. Members of Disciplinary Board
  - ii. Rules Applicable to Disciplinary Board
    - 1. How to Handle Vacancies
    - 2. Providing Notice of Resignation/Declination to Serve

- 3. Persons Ineligible to Serve Due to Other Positions/Titles
- iii. Provide for and Publicize Methods & Means of Reporting Information Regarding Offenses
- iv. Provide Advisors (IV.19.10)
- v. Provide by Canon System of Challenge as to Membership of Any Panel of Board Appointed for Proceeding (IV.19.15)

17. Provincial Responsibilities

- a) Creation of Court of Review
  - i. Members of Court of Review
  - ii. Rules Applicable to Court of Review
  - iii. Vacancies
  - iv. Clerk
  - v. Rules of Procedure Governing Appeals

18. Offenses/Causes for Proceedings/What is Meant by “Of Accountability”

19. Consequences

20. Who Can Bring Charges

21. Different Types of Charges

22. Differences Between Priests and Bishops Processes

23. Similarities Between Priests and Bishops Processes

24. Standards of Conduct (with examples)

- a) Confidences
- b) Rubrics
- c) Vows
- d) Accords or Orders
- e) Property
- f) Reporting Offenses
- g) Faithful Exercise of Ministry
- h) Restraint in Conduct

25. Intake and Referral of Information

- a) Reporting Offenses
- b) Method of Submission
- c) Role of Intake Officer
- d) Investigation
- e) Dismissal
- f) Appeal of Dismissal
- g) Empanelment
- h) Reference Panel
- i) Determinations
- j) Confidentiality
  - i. Exceptions to Confidentiality

26. Pastoral Direction, Restricted Ministry & Administrative Leave

- a) When a Pastoral Direction Can be Issued
- b) Requirements/Conditions for Pastoral Direction

- c) When Can Place Restrictions or Place on Administrative Leave Without Prior Notice or Hearing
- d) Notice & Requirements for Notice of Restrictions & Leaves
- e) Duration
- f) When May Be Modified
- g) When Become Effective
- h) Disclosure of Information Regarding Pastoral Information
- i) Clergy Request for Review
  - i. Who Conducts Review
    - 1. When Conducted by Conference Panel
    - 2. When Conducted by Hearing Panel
  - ii. Question Before Panel
  - iii. How Conducted
  - iv. Who Has Opportunity to Be Heard
  - v. Panel to Make Determination

#### 27. Pastoral Responses

- a) Standards/Requirements for Pastoral Responses
- b) Who is Eligible for Pastoral Care (with examples)
  - i. Complainant
  - ii. Complainant's Family
  - iii. Respondent
  - iv. Respondent's Family
  - v. Injured Persons
  - vi. Injured Persons' Families
  - vii. Affected Community
  - viii. Witnesses
  - xi. Disciplinary Board
- c) Disclosure/When Appropriate
- d) Privacy Interests
- e) Designation of Person Responsible for Implementation of Pastoral Response

#### 28. Agreements Between Bishops Diocesan and Respondents for Discipline

- a) Respondent/Clergy to Proposed Terms of Discipline
- b) When Accord May Be Entered Into
  - i. When Accord May Be Withdrawn
  - ii. What Canons Accords Are Subject To

#### 29. Conciliation

- a) Goal of Conciliation
- b) How Conciliator Appointed
- c) If Conciliation Successful
- d) If Conciliation Cannot Be Achieved
- e) Qualifications for Conciliator

#### 30. Investigations

- a) How Many Investigators

- b) Responsibilities/Goals
- c) Report to Reference Panel
- d) Confidentiality

### 31. Conference Panels

- a) Reference to Conference Panels
- b) Who Will Participate in Proceedings
- c) Notices of Proceedings
- d) Required and Permitted Attendees
- e) Tone, Nature, and Conduct of Conference Panel Proceedings
- f) No Record of Proceedings/Closed Proceedings
- g) Conference Panel Determination
- h) Order of Dismissal
- i) Accord or Other Order
- j) Objections to Notice of Conference Panel

### 32. Hearing Panels

- a) Reference to Hearing Panel
- b) Statement of Offense and Notice
- c) Respondent's Response
- d) Attendance at Hearings
- e) Public Proceedings
  - i. Exceptions/When Kept Private
- f) Evidence and Discovery
- g) Testimony
- h) Determination
- i) Order of Dismissal

### 33. Accords and Orders

- a) Distinguish When Results from Conciliation vs. When from Proceedings Before a Conference Panel
- b) Complainant Has Opportunity to Be Heard
- c) Who Signs Accord
- d) Distribution of Accord
- e) Pronounce Sentence or Terms of Accord
- f) What May be Included in Order Issued by Conference or Hearing Panel
- g) Other Required Provisions in Accords and Orders
- h) Objections to Order
- i) Notice of Accords and Orders Which Have Become Effective
- j) Disclosure

### 34. Review by Provincial Court of Review

- a) Unreasonable Delay of Proceedings/Requests Filed with Provincial Court of Review for Hearing Panel to Resume Proceedings
  - i. Who Files
  - ii. Requirements for Filing
  - iii. Hearing Panel's Required Response

- iv. Provincial Court of Review's Consideration of Request
- v. When Transfer of Matter May be Appropriate
- b) Appeal of Orders
- c) Appeal by Bishop Diocesan
- d) Non-Provincial Appeals
- e) Record on Appeal
- f) Standards for Appeal
- g) Appeal Record
- h) Attendance for Oral Proceedings
- i) Record of Proceedings, Opportunity to Be Heard, Overturning Order
- j) Decisions by Court

### 35. Abandonment of The Episcopal Church

- a) By a Bishop
  - i. Certification of Abandonment
  - ii. Notice by Presiding Bishop or Presiding Officer of Certification and Restriction on Ministry
    - 1. Opportunity to Say Facts False
    - 2. Liable to Deposition
  - iii. By a Priest or Deacon
    - 1. Report to Standing Committee
    - 2. Standing Committee's Determination and Communication to Bishop Diocesan
    - 3. Bishop Diocesan's Restriction on Ministry
    - 4. Time Period to Retract Declaration and Acts Relied Upon

### 36. Proceedings Applicable to Bishops

- a) Disciplinary Board for Bishops
  - i. Composition
  - ii. Method of Appointment
  - iii. Eligibility to Serve
  - iv. President of Disciplinary Board
- b) Conference Panel Composition
- c) Hearing Panel Composition
- d) Sentencing of a Bishop
  - i. Certain Provisions Not Applicable
  - ii. Time Frames Applicable
  - iii. Limitations on When Can Be Pronounced
- e) Statement of Disassociation
  - i. When Can Be Brought
  - ii. Who Can Bring/How Many Bishops Diocesan
  - iii. What Must be Included
  - iv. Procedure and Time Frames
  - v. Consideration by House of Bishops
  - vi. Request by House of Bishops to Presiding Bishop to Initiate Proceedings for Disassociation
- f) Court of Review for Bishops
  - i. Composition of Court & Election of President
  - ii. Expenses

iii. Agreement for Discipline by a Bishop & When Becomes Effective

37. Modification & Remission of Orders

- a) Who Can Apply
- b) To Whom Application for Modification or Remission May Be Made
- c) Standard for Granting Modification and/or Remission
- d) In Priest/Deacon Cases, How to Modify/Remit in Cases Other Than Deposition
- e) In Priest/Deacon Cases, How to Modify/Remit in Cases of Deposition
- f) When Member of Clergy Has been Deposed for Abandoning Church
- g) In Bishop Cases
- h) Opportunity to Be Heard

38. General Provisions

- a) Clarification of Nature of Proceedings as Ecclesiastical, Neither Civil Nor Criminal
- b) Resort to Secular Courts Not Permitted
- c) Time Limitation on Proceedings
  - i. General Rule of 10-Year Limitations Period
  - ii. Exceptions to General Rule
    - 1. 3-Year Extension After Civil Court Judgment or Criminal Court Conviction of Matter Involving Immorality
    - 2. Extension to When Injured Person Attains Age 25 When Injured Person Was Under Age 21 at Time Of Alleged Act
    - 3. 2-Year Extension After Injured Person's Disability Ceases When Injured Person Was Under Disability At Time of Alleged Acts
    - 4. No Time Limit for Physical Violence, Sexual Abuse, Sexual Exploitation When Alleged Injured Person Was Under Age of 21
    - 5. When Must Be Initiated Within 2 Years (IV.3.1(a), IV.4.1(b), (c), (e), (h)(2))
  - iii. Note 1/1/96 Retroactivity Period except for physical violence, sexual abuse, sexual exploitation when alleged person under age 21
  - iv. What Constitutes Initiation of Proceedings for Limitations Purposes
- d) Jurisdiction and Venue (a.k.a., "Where")
  - i. Clergy
    - 1. In General
      - a) Where Canonically Resident
      - b) Where Alleged Offense Alleged to Have Occurred
    - 2. Special Rules When Referral Made to Intake Officer In Diocese Where Clergy Not Canonically Resident
      - a) Procedure When Objection Made by Bishop Diocesan of Diocese of Canonical Residence
- e) Effect of Respondent's Failure to Appear in Any Proceeding Under Title IV
- f) Sentence of Suspension or Restriction on Ministry
  - i. Effect in General
  - ii. Effect of Suspension of Rector Upon Pastoral Relationship
    - 1. Exceptions
- g) How to Compute Time Periods
  - i. Which Days Are Included for Purposes of Calculation
  - ii. Which Days are Excluded for Purposes of Calculation
  - iii. Effects of Saturday, Sunday, Legal Holiday
  - iv. Service by Mail Extends 5 Days



- v. What Is Meant by “promptly” or “Without Delay”
- h) What is Meant by Quorum
- i) Advisors
  - i. Purpose of Advisors/Advisors’ Role
  - ii. When Bishop Diocesan Must Make Advisor Available to Respondent
  - iii. When Bishop Diocesan Must Make Advisor Available to Complainant
  - iv. Who is Disqualified from Serving as Advisor
  - v. No Requirement that Services Be Accepted
  - vi. Nature of Communications as Privileged
  - vii. Who Bears Costs and Expenses
  - viii. Rights of Advisors
- j) Prohibition Against Improper Influence
- k) Right to Counsel
- l) Liability for Retrial Barred
- m) Impartiality & Disqualifications (with examples)
  - i. Bishops Diocesan
    - 1. Impartiality May Reasonably Be Questioned
    - 2. Self, Spouse, or Person within 3rd Degree of Relationship is Respondent, Complainant or Inured Person
  - ii. Panel Member
    - 1. Impartiality May Reasonably Be Questioned
    - 2. Member, Member’s Spouse, Person Within 3rd Degree of Relationship to Either, or Spouse of Such Person
      - a) Is Respondent, Complainant, or Injured Person
      - b) Likely to Be Witness
      - c) Has Personal Bias or Prejudice Concerning Respondent, Complainant, or Injured Person (with examples)
      - d) Has Personal Knowledge of Disputed Evidentiary Facts Concerning Proceeding (with examples)
      - e) Has a Personal Financial Interest in Outcome of Proceeding or in the Respondent, Complainant, any Injured Person, or Any Other Interest That Could be Substantially Affected By Outcome (with examples)
      - f) Is Member of Same Congregation or Otherwise Has Close Personal or Professional Relationship with the Respondent, the Complainant, any Injured Person or Any Witness in the Matter (with guidance)
    - 3. If Panel Member Has Not Disqualified Himself/Herself as Provided Above:
      - a) Who Can Challenge
      - b) Who Investigates
    - 4. Waivers of Grounds for Disqualification & Requirement of Full Disclosure on Record of Ground for Basis of Disqualification
  - iii. System of Challenge to Membership of Panel of Board Appointed for Any Proceeding
- n) Presumption of Innocence
- o) Burden of Proof
- p) Duty of All Church Members to Appear and Testify
- q) Church Attorney/Disqualifications of Certain Chancellors from Serving
- r) Notices Duly Served/Method of Serving
- s) When References to Bishop Diocesan May Include Bishop Coadjutor, Bishop Suffragan, or Assistant Bishop
- t) Disciplinary Board or Court of Review May Obtain Legal Counsel
  - i. If Retained, Role of Legal Counsel

- u) Expenses
  - i. General Rule
  - ii. Expenses of Diocese
  - iii. Expenses of Province
  - iv. Expenses of General Convention
  - v. Nothing Precludes Voluntary Payment of Respondent's Costs
- v) Who Acts in Presiding Bishop's Place if Presiding Bishop Unavailable by Virtue of Absence, Disability, or Other Disqualification
- w) When No Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan or Assistant Bishop
- x) Confidential Communication
  - i. Exceptions to General Rule
- y) Privileged Communication
  - i. Exceptions to General Rule
- z) Non-Compliance with Procedural Requirements as General Rule Not Grounds for Dismissal of Proceedings
  - i. Exception When Causes Material & Substantial Injustice to Be Done or Seriously Prejudices Rights Of Respondent
    - 1. Who Determines
- aa) Former Sentence of Removal Deemed Sentence of Deposition
- bb) Preservation of Records
  - i. Keeping complete and accurate records by Hearing Panel & Provincial Court of Review
    - 1. Record to be Certified
    - 2. Copy to Be Kept in Diocese in Which Proceeding Originated
    - 3. Original Delivered to Archives
  - ii. Bishop Diocesan to Deliver to Archive Accords & Orders that Have Become Effective & Record of Action of Remission or Modification of Any Order and Preserve and Keep Copies as Well
- cc) Imputation — Clergy Who Deems Self Under Imputation (by rumor, etc.) Can Request Bishop Diocesan to Conduct Inquiry
- dd) When Act/Omission Occurred Prior to Effective Date of New Title IV

#### H. List of Topics for Title IV Training Materials

1. Overview
2. Offenses/Causes for Proceedings/What is Meant by "Of Accountability"
3. Different Types of Charges
4. Standards of Conduct
5. Rights and Responsibilities of Each Player
6. Private Information, Public Information, Confidentiality and Privilege
7. Evidentiary Standards, Burdens of Proof, Related Hearing-Panel Issues
8. Resources Available for Assistance
9. Diocesan Responsibilities
10. Provincial Responsibilities
11. Intake and Referral of Information
12. Things Clergy Need to Know, Including Agreements between Bishops Diocesan and Respondents for Discipline, Requests for Review, and Conciliation
13. Matters Chancellor Advises Bishop On, Including Confidentiality and Exceptions Thereto, Pastoral Direction, Restricted Ministry & Administrative Leave, Pastoral Responses, and Agreements Between Bishops Diocesan and Respondents for Discipline
14. Investigations

15. Conference Panels
16. Hearing Panels
17. Accords and Orders
18. Review by Provincial Court of Review
19. Abandonment of the Episcopal Church by Priest or Deacon
20. Modification & Remission of Orders
21. Impartiality & Disqualifications
22. Presumption of Innocence and Burden of Proof
23. Preservation of Records

D. Resolution 2012-C116: Constitutionality of Certain Provisions of Title IV

This Resolution directed the Commission to consider whether Title IV violates the Church's Constitution by (1) authorizing the Presiding Bishop, without seeking the consent of certain others, to restrict the ministry of a Diocesan Bishop who may have committed an Offense, and (2) requiring each Diocese to create a court system prescribed by the Title for the discipline of Priests and Deacons. The resolution also directed the Commission to provide a process by which all interested persons could be heard on the issue, and to report its findings to the 78th General Convention.

As noted above, in 2013 the Commission solicited comments from the church community about Title IV. Only one commenter directed the Commission to C116. There were no other comments concerning the constitutionality of the Title.

During the previous triennium, in 2011, the Diocese of Albany adopted a resolution asking the Commission to review concerns that had been raised over the constitutionality of certain provisions of Title IV. The Commission concluded that such an inquiry was beyond the scope of the Commission's mandate, which is defined in Canon I.2.2(n)(3) and does not include a review of canons adopted by the General Convention to consider their validity under the Church's constitution.

In this instance, because Resolution 2012-C116 was adopted by the General Convention, its direction to this Commission stands in a different posture. Accordingly, the Commission has considered the constitutionality questions raised by C116, and has concluded that the provisions are constitutional for the following reasons. Unlike our secular federal government, there is no separate body in the Church, akin to a "Supreme Court," with authority to declare an act of the General Convention unconstitutional. Rather, in the Church, the General Convention is the final arbiter of the meaning of the Constitution and Canons. Accordingly, when the General Convention adopts a canon, it is by definition constitutional, and the General Convention is presumed to have ensured that it is so.

E. Resolution 2012-D047: Prohibiting Certain Blanket Non-Disclosure Agreements

This Resolution proposed prohibiting every Diocese, Parish, Mission, or other entity associated with the Church from entering into any non-disclosure agreement during the dissolution of a pastoral or employment relationship, and declaring that any such agreement be void and unenforceable. The Commission considered the Resolution. While "non-disclosure agreements" during the dissolution of a pastoral or employment relationship are not provisions in a termination agreement that should be used either routinely or regularly, especially in matters related to Title IV, the Commission recognizes that there could be circumstances under which a non-disclosure agreement would be appropriate and in the best interest for all concerned. The Commission recommends that no action be taken on this Resolution.

F. Resolution 2012-Do83: Amend Canons III.9 and III.12 — Substitution for Presentment and Trial

This Resolution called for the amendment of two Canons that included terms related to procedures under the prior Title IV and that are not found in the current Title. As reflected later in this Report, the Commission proposes that the term “presentment” found in Canon III.9.4(d) be replaced with “potential disciplinary action,” and that the term “trial” found in Canon III.12.3(a)(2) be replaced with “disciplinary proceedings.”

G. Resolution 2012-Do13: Amend Canon III.5.2(b) — Testimonial Requirements

This Resolution called for the amendment of Canon III.5.2(b) to permit Diocesan Standing Committee members to give a power of attorney to another member to sign testimonials for him or her to expedite the signature process when a meeting is held telephonically or through other electronic means. The Commission considered the Resolution. It recognized the need to facilitate the execution of testimonials, while recognizing issues that could arise from the appointment of a power of attorney. Later in this Report, the Commission offers a substitute resolution which would provide that a signature to a testimonial that may be executed in counterparts may be delivered electronically and deemed to be an original.

H. Resolution 2012-A076: Strengthen Small Communities

This resolution requires that each interim body and program of The Episcopal Church take into account the impact of its activities on small congregations and small dioceses and make a priority of facilitating the Five Marks of Mission in this area.

The Commission has reflected on how its work strengthens small congregational and other communities. It is our considered opinion that expecting the Church’s smaller parishes and other smaller bodies to have an understanding of the canons is a critical component of their inclusion in the common life of the whole Episcopal Church. All Episcopal Church bodies, institutions, and Members of the Clergy are bound by the same canon law, regardless of size or wealth.

We believe that the canons provide thoughtful guidance for good governance for any parish, mission, or other smaller faith community. Finally, the Commission hopes that by clarifying the Church’s governing law, it enhances the ability of smaller communities to embrace the Five Marks of Mission; and, notes, moreover, that, in living out the Five Marks of Mission, the leadership of such communities will need to give thoughtful consideration to the canons and seek constructive guidance from diocesan canon lawyers to ensure compliance with the canons as plans and goals are developed.

**6. Goals and Objectives for 2016-2018 Triennium**

1. Develop and implement Title IV Training Program.
2. Address the need for further definition of the term “Conduct Unbecoming of a Member of the Clergy” in Title IV.
3. Identify and address conflicts between the Church Canons and legal systems in foreign countries.
4. Provide “whistle-blower” protection under Title IV.
5. Continue Title IV review.
6. Continue with update of White & Dykman.
7. Continue to review the full body of the Constitution and Canons, and 2015 resolution referrals, consistent with its Canon I.1.2(n) Mandate.
8. Continued review of statutes of limitation for proceedings under Title IV.

## 7. Budget Report

The Commission met 20 times during the triennium — three times in person and 17 times by Adobe Connect videoconference. The Commission expended \$20,373.74, leaving \$10,697.26 unexpended from its budget. The remaining funds will assist in financing the next in-person meeting of the White & Dykman Subcommittee to continue its work on the updates for White & Dykman.

The Commission expects to meet a similar number of times in the 2016-2018 triennium. This will require a budget of \$13,000 for 2016; \$13,000 for 2017; \$13,000 for 2018; \$564,020 for the development and implementation of Title IV Training Program, of which \$339,200 is attributable to the development of online training modules, travel for presenters, resource team budget, and miscellaneous items, and the \$224,820 balance of which is attributable to the translation of materials into Spanish and Creole; for a total of \$603,020 for the triennium.

## 8. Acknowledgments

The Commission wishes to express its gratitude to its members for their many contributions during the triennium; to the Commission's liaisons (Stan Runnels, liaison to Executive Council; Mary Kostel, liaison to the Presiding Bishop; and Dorothy Jane Porpeggia, liaison to the President of the House of Deputies) for their hard work and thoughtful counseling; to all of the staff members of the General Convention Office, especially Brian Murray, Iris Martinez, and Patrick Haizel, whose steady and patient work made the Commission's meetings, travel, and deliberations not only possible but enjoyable.

## 9. PROPOSED CANONICAL AMENDMENTS

### A. A117: AMEND CANON I.1.2(N)(3)

Resolved, the House of \_\_\_\_\_ concurring, That Canon I.1.2(n)(3)(i) be amended as follows:

(i) Review such proposed amendments to the Constitution and Canons as may be submitted to the Commission, placing each such proposed amendment in proper Constitutional or Canonical form including all amendments necessary to effect the proposed change. *For amendments not in proper form, the Standing Commission on Constitution and Canons may direct the submitting Commission to the canonical and Rules of Order requirements for amendments to the Constitution and Canons so the submitting Commission may revise their amendment to proper form.* The Commission shall express its views with respect to the substance of any such proposal only to the proponent thereof; Provided, however, that no member of the Commission shall, by reason of membership, be deemed to be disabled from expressing, before a Legislative Committee or on the floor of the House of membership, personal views with respect to the substance of any such proposed amendment.

### EXPLANATION

Currently, Commissions or other authorized bodies may submit resolutions involving amendments to the Constitution or Canons in any form and depend upon the Standing Commission on Constitution and Canons (SCCC) to put resolutions in proper form. As the rules as to form for such amendments are printed in the Joint Rules of Order and in the Canons, the SCCC believes that the proposing Commission or other body submitting such a constitutional or canonical amendment should be responsible for ensuring the proper form of such submissions.

**B. A118: AMEND CANONS I.1, I.6.5, I.9.11, AND V.1; AND JOINT RULE OF ORDER V.15**

Resolved, the House of \_\_\_\_\_ concurring, That Canon I.1.1 be amended to read as follows:

(a) At the time and place appointed for the meeting of the General Convention, the President of the House of Deputies, or, if absent, the Vice President of the House, or, if there be neither, a presiding officer pro tempore appointed by the members of the House of Deputies on the Joint Committee of Arrangements for the General Convention, shall call to order the members present. The Secretary of the House of Deputies, or, if absent, a Secretary pro tempore appointed by the presiding officer, shall record the names of those whose testimonials, in due form, shall have been presented, which record shall be prima facie evidence that the persons whose names are therein recorded are entitled to seats. In the event that testimonials are presented by or on behalf of persons from jurisdictions which have not previously been represented in a General Convention, then the Secretary, or one appointed instead as provided herein, shall proceed as provided in Clause (c). If there be a quorum present, the Secretary of the House of Deputies shall so certify, and the House shall proceed to organize by the election, by ballot, of a Secretary of the House of Deputies, and a majority of the votes cast shall be necessary to such election. *Nominees for Secretary of the House of Deputies must be confirmed communicants in good standing or clergy of The Episcopal Church.* Upon such election, the presiding officer shall declare the House organized. If there be a vacancy in the office of President or Vice President, the vacancy or vacancies shall then be filled by election, by ballot, the term of any officer so elected to continue until the adjournment of the General Convention. As soon as such vacancies are filled, the President shall appoint a committee to wait upon the House of Bishops and inform it of the organization of the House of Deputies, and of its readiness to proceed to business.

(b) There shall be a President and a Vice-President of the House of Deputies, who shall perform the duties normally appropriate to their respective offices or specified in these Canons. They shall be elected not later than the seventh day of each regular meeting of the General Convention in the manner herein set forth. The House of Deputies shall elect from its membership, by a majority of separate ballots, a President and a Vice-President, who shall be of different orders. Such officers shall take office at the adjournment of the regular meeting at which they are elected, and shall continue in office until the adjournment of the following regular meeting of the General Convention. They shall be and remain *ex officio* members of the House during their term of office. No person elected President or Vice-President shall be eligible for more than three consecutive full terms in each respective office. In case of resignation, death, absence, or inability, of the President, the Vice-President shall perform the duties of the office until the adjournment of the next meeting of the General Convention. In case of resignation, death, absence, or inability of the Vice-President, the President shall appoint a Deputy of the opposite order, upon the advice and consent of the lay persons, presbyters and deacons of the Executive Council, who shall serve until the adjournment of the next meeting of the General Convention. The President shall be authorized to appoint an Advisory Council for consultation and advice in the performance of the duties of the office. The President may also appoint a Chancellor to the President, a confirmed adult communicant of the Church in good standing who is learned in both ecclesiastical and secular law, to serve so long as the President may desire, as counselor in matters relating to the discharge of the responsibilities of that office.

(c) In order to aid the Secretary of the House of Deputies in preparing the record specified in Clause (a), it shall be the duty of the Secretary of the Convention of every Diocese to forward to the Secretary of the House of Deputies, as soon as may be practicable, a copy of the latest Journal of the Diocesan Convention, together with a certified copy of the testimonials of members aforesaid, and a duplicate copy of such testimonials. Where testimonials are received for persons from jurisdictions which have not previously been

represented in General Convention, the Secretary shall ascertain that the applicable provisions of Article V, Section 1, of the Constitution have been complied with prior to such persons being permitted to take their seats in the House.

(d) The Secretary of the House of Deputies shall keep full minutes of the proceedings of the House; record them, with all reports, in a book provided for that purpose; preserve the Journals and Records of the House; deliver them to the Registrar, as hereinafter provided; and perform such other duties as may be directed by the House. The Secretary shall appoint a First Assistant Secretary of the House of Deputies and may, with the approval of the House, appoint other Assistant Secretaries, and the Secretary of the House of Deputies and the First Assistant Secretary, ~~and Assistant Secretaries~~ shall continue in office until the organization of the next General Convention, and until their successors be chosen.

(e) It shall be the duty of the Secretary of the ~~House of Deputies~~ General Convention, whenever any alteration of the Book of Common Prayer or of the Constitution is proposed, or any other subject submitted to the consideration of the several Diocesan Conventions, to give notice thereof to the Ecclesiastical Authority of the Church in every Diocese, as well as to the Secretary of the Convention of every Diocese, and written evidence that the foregoing requirement has been complied with shall be presented by the Secretary of the General Convention to the General Convention at its next session. All such notices shall be sent by certified or registered mail, with the local Secretary's certificates to be returned. The Secretary of the General Convention shall notify all diocesan Secretaries that it is their duty to make known such proposed alterations of the Book of Common Prayer, and of the Constitution, and such other subjects, to the Conventions of their respective Dioceses at their next meeting, and to certify to the Secretary of the ~~House of Deputies~~ of the General Convention that such action has been taken.

(f) The Secretary of the House of Deputies and the Treasurer of the General Convention shall be entitled to seats upon the floor of the House of Deputies, and, with the consent of the President, they may speak on the subjects of their respective offices.

(g) At the meetings of the House of Deputies the Rules of Order of the previous meeting shall be in force until they are amended or repealed by the House.

(h) In case of the resignation, death or total disability of the President and Vice-President during the recess of the General Convention, the Secretary of the House of Deputies shall perform such *ad interim* duties as may appertain to the office of President until the next meeting of the General Convention or until such disability is removed.

(i) If, during recess, a vacancy shall occur in the office of Secretary of the House of Deputies, the duties thereof shall devolve upon the First Assistant Secretary, or, if there be none such, upon a Secretary pro tempore appointed by the President of the House of Deputies, or if the office of President be also vacant, then by the Vice-President, and if both offices be vacant, then by the members from the House of Deputies of the Joint Committee on Planning and Arrangements for the next General Convention, appointed by the preceding General Convention.

(j) At every regular meeting of the General Convention, the Secretary of the House of Deputies elected by the House of Deputies shall, by concurrent action of the two Houses of the General Convention, also be made the Secretary of the General Convention, who shall have responsibility for assembling and printing of the Journal of the General Convention, and for other matters specifically referred by *General Convention or its officers to the Secretary of the General Convention. If a vacancy shall occur in the office of Secretary of the General Convention, the duties thereof shall devolve upon a Secretary pro tempore jointly appointed by the President of the House Deputies, or if the office of President be vacant, then by the Vice President, and the Presiding Bishop. The term of the Secretary pro tempore shall extend until the election of a Secretary of the General Convention at the next regular General Convention.*; and be it further

Resolved, That Canon I.6.5 be amended as follows:

(a) It shall be the duty of the Secretary of the Convention of every jurisdiction to forward to the Secretary of the *General Convention of the House of Deputies*, immediately upon publication, two copies of the Journals of the Convention of the jurisdiction, together with Episcopal charges, statements, and such other records in paper or electronic format as may show the state of the Church in that jurisdiction, and two copies to the Archives of the Church in a common format as prescribed by the Archivist of the Church.; and be it further

Resolved, That Canon I.9.11 be amended as follows:

Sec. 11. Each Provincial Synod shall keep minutes, journals or other records of its meetings, and shall transmit one copy of the records to the Secretary of the *General Convention House of Deputies*, and one copy to the Archives of The Episcopal Church. The Synod shall also transmit copies of any unpublished inactive records to the Archives.; and be it further

Resolved, That Canons V.1.2 and V.1.5 be amended as follows:

Sec. 2. Whenever a Canon is amended, enacted, or repealed in different respects by two or more independent enactments at the same General Convention, including the enactment of an entire Title, the separate enactments shall be considered as one enactment containing all of the amendments or enactments, whether or not repealed, to the extent that the change made in separate amendments or enactments, are not in conflict with each other. The two members of the Committee on Canons from each House of General Convention appointed pursuant to Canon V.1.5(a) shall make the determination whether or not there is a conflict and certify the text of the single enactment to the Secretary of *the General Convention*.

Sec. 5 (a) The Committee on Canons of each House of the General Convention shall, at the close of each regular meeting of the General Convention, appoint two of its members to certify the changes, if any, made in the Canons, including a correction of the references made in any Canon to another, and to report the same, with the proper arrangement thereof, to the Secretary of *the General Convention*, who shall publish them in the Journal.

(b) The Committee on Constitution of each House of the General Convention shall, at the close of each regular meeting of the General Convention, appoint a similar committee of two of its members to certify in



like manner the changes, if any, made in the Constitution, or proposed to be made therein under the provisions of Article XII of the Constitution, and to report the same to the Secretary of the General Convention, who shall publish them in the Journal. The committee shall also have and exercise the power of renumbering of, and correction of references to, Articles, Sections and Clauses of the Constitution required by the adoption of amendments to the Constitution at a meeting of the General Convention in the same manner as provided with respect to the Canons in the foregoing Sections 4 and 5(a) of this Canon.; and be it further

Resolved, That Joint Rule of Order V.15, be amended to read as follows:

15. The Secretary of the ~~House of Deputies—General Convention, being the Secretary of the General Convention,~~ shall, with the cooperation of the Secretary of the House of Bishops, ~~and of such Bishops as may be appointed by the Presiding Officer of the House of Bishops~~ prepare a summary of the actions of the General Convention of particular interest to the Congregations of the Church, and make the same available to the Congregations, through the Ministers-in-charge thereof, and to the Lay Deputies; such summary to be sent to the Clergy along with the Pastoral Letter put forth by the House of Bishops, and to be made available to all Deputies on the last day of the Convention, along with such Pastoral Letter, if feasible to do so, or within thirty days thereafter.

EXPLANATION

These amendments are all related to the role and function of the Secretary of General Convention and the Secretary of the House of Deputies. The intent of these amendments is to clarify the roles and functions of each of these offices and to ensure that there is clarity of the duties and responsibilities of each office.

C. A119: AMEND CANON III.5.2(B)

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.5.2(b) is hereby amended to read as follows:

(b) 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, each of which shall be deemed an original. *If executed and delivered by facsimile or other electronic transmission, each shall also be deemed to be an original.*

EXPLANATION

This resolution provides that a signature to a testimonial that may be executed in counterparts may be delivered electronically and be deemed to be an original in order to expedite the processing of testimonials.

D. A120: AMEND CANON III.7 TO ADD 7.11; AMEND CANON III.9, TO ADD 9.12, AND RENUMBER 9.12 AND 9.13; AND AMEND CANON III.12, TO ADD 12.8 AND RENUMBER 12.8, 12.9, AND 12.10

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.7 be amended to add a new Canon III.7.11 to read as follows:

**Sec. 11. Return to the Ordained Ministry of this Church after Release and Removal.**

(a) *When a Deacon who has been released and removed from the ordained Ministry of this Church under Canon III.7.8 desires to return to that Ministry, the person shall apply in writing to the Bishop of the Diocese in which the Deacon was last canonically resident, attaching the following:*

- (1) Evidence that the person is a confirmed adult communicant in good standing in a Congregation of this Church;
- (2) Evidence of previous ordained Ministry in this Church, and other Churches as applicable.
- (3) Evidence of moral and godly character;
- (4) Evidence that the person is free from any vows or other engagements inconsistent with the exercise of ordained Ministry in this Church;
- (5) A certificate from at least two Clergy in this Church stating that, from personal examination or from satisfactory evidence presented to them, they believe that the departure of the person from the ordained Ministry of this Church and from the ordained Ministry of any other Church to which the person has belonged since his or her departure from the ordained Ministry of this Church has not arisen from any circumstance reflecting unfavorably on his or her moral or religious character, or on account of which it may not be expedient to permit the person to return to the ordained Ministry of this Church;
- (6) A letter of support in the form provided in Canon III.6.6(b)(2) from the Rector or Member of the Clergy in charge and Vestry of a Parish of this Church; and
- (7) A statement of the reasons for seeking to return to the ordained Ministry of this Church.

(b) The provisions of Canon III.6.5(a) shall be applicable.

(c) The Commission on Ministry may, with the consent of the Bishop, and with notice to the applicant, examine the applicant in any subject described in Canons III.6.5(f) and (g).

(d) Before the person may be permitted to return to the ordained Ministry of this Church, the Bishop shall require a promise in writing to submit in all things to the Discipline of this Church without recourse to any other ecclesiastical jurisdiction, and shall further require the person to subscribe and make in the presence of the Bishop and two or more members of the Clergy of this Church the declaration required in Article VIII of the Constitution.

(e) Thereafter the Bishop, being satisfied of the person's theological qualifications and soundness in the faith, taking into account the facts and circumstances surrounding the person's removal and release, may permit, with the advice and consent of the Standing Committee, the return of the person into the ordained Ministry of this Church.

(f) No one shall be permitted to return to the ordained Ministry of this Church under this Canon less than twelve months from the date of having most recently become a communicant of this Church unless the Bishop Diocesan and a majority of the members of the Standing Committee conclude that special circumstances exist to merit such return which will benefit the needs of this Church.

(g) Notice of the person's return to the ordained Ministry of this Church shall be provided in writing to the same persons and entities receiving notice under Canon III.7.10.; and be it further

Resolved, That Canon III.9 be amended to add a new Canon III.9.12 to read as follows, and renumbering the two subsequent sections to be Canon III.9.13 and III.9.14.

**Sec. 12. Return to the Ordained Ministry of this Church after Release and Removal.**

(a) When a Priest who has been released and removed from the ordained Ministry of this Church under Canon III. 9.8 desires to return to that Ministry, the person shall apply in writing to the Bishop of the Diocese in which the Priest was last canonically resident, attaching the following:

- (1) Evidence that the person is a confirmed adult communicant in good standing in a Congregation of this Church;
- (2) Evidence of previous ordained Ministry in this Church and other Churches as applicable;
- (3) Evidence of moral and godly character;
- (4) Evidence that the person is free from any vows or other engagements inconsistent with the exercise of ordained Ministry in this Church;
- (5) A certificate from at least two Priests in this Church stating that, from personal examination or from satisfactory evidence presented to them, they believe that the departure of the person from the ordained Ministry of this Church and from the ordained Ministry of any other Church to which the person has belonged since his or her departure from the ordained Ministry of this Church has not arisen from any circumstance reflecting unfavorably on his or her moral or religious character, or on account of which it may not be expedient to permit the person to return to the ordained Ministry of this Church;
- (6) A letter of support in the form provided in Canon III.8.7(b)(2) from the Rector or Member of the Clergy in charge and Vestry of a Parish of this Church; and
- (7) A statement of the reasons for seeking to return to the ordained Ministry of this Church.

(b) The provisions of Canon III.8.5(a) shall be applicable.

(c) The Commission on Ministry may, with the consent of the Bishop, and with notice to the applicant, examine the applicant in any ~~other~~ subject required described in ~~by~~ Canons III.8.5(g) and (h).

(d) Before the person may be permitted to return to the ordained Ministry of this Church, the Bishop shall require a promise in writing to submit in all things to the Discipline of this Church without recourse to any other ecclesiastical jurisdiction or foreign civil jurisdiction, and shall further require the person to subscribe and make in the presence of the Bishop and two or more Presbyters the declaration required in Article VIII of the Constitution.

(e) Thereafter the Bishop, being satisfied of the person's theological qualifications and soundness in the faith, taking into account the facts and circumstances surrounding the person's removal and release, may permit, with the advice and consent of the Standing Committee, the return of the person into the ordained Ministry of this Church.

(f) No one shall be permitted to return to the ordained Ministry of this Church under this Canon less than 12 months from the date of having most recently become a communicant of this Church unless the Bishop Diocesan and a majority of the members of the Standing Committee conclude that special circumstances exist to merit such return which will benefit the needs of this Church.

*(g) Notice of the person's return to the ordained Ministry of this Church shall be provided in writing to the same persons and entities receiving notice under Canon III.9.11.; and be it further*

Resolved, That Canon III.12 be amended to add a new Canon III.12.8, to read as follows, and renumbering the three subsequent sections to be Canon III.12.9, III.12.10, and III.12.11.

**Sec. 8. Return to the Ordained Ministry of this Church after Release and Removal**

*(a) When a Bishop who has been released and removed from the ordained Ministry of this Church under Canon III.12.7 desires to return to that Ministry, the person shall apply in writing to the Presiding Bishop, attaching the following:*

- (1) Evidence that the person is a confirmed adult communicant in good standing in a Congregation of this Church;*
- (2) Evidence of previous ordained Ministry in this Church, and other Churches as applicable;*
- (3) Evidence of a moral and godly character;*
- (4) Evidence that the person is free from any vows or other engagements inconsistent with the exercise of ordained Ministry in this Church;*
- (5) A certificate from at least two Bishops in this Church stating that, from personal examination or from satisfactory evidence presented to them, they believe that the departure of the person from the ordained Ministry of this Church and from ordained Ministry of any other Church to which the person has belonged since his or her departure from the ordained Ministry of this Church has not arisen from any circumstance reflecting unfavorably on his or her moral or religious character, or on account of which it may not be expedient to permit the person to return to the ordained Ministry of this Church;*
- (6) A letter of support from the Bishop of the Diocese in which the person was last canonically resident; and*
- (7) A statement of the reasons for seeking to return to the ordained Ministry of this Church.*

*(b) The Presiding Bishop shall examine the person regarding his or her reasons for departure from the ordained Ministry of this Church, reasons for seeking to return to that Ministry, and any other subject reflecting on that person's fitness to return to the ordained Ministry of this Church. The Presiding Bishop may, at his or her discretion, invite others to participate in the examination.*

*(c) Before the person may be permitted to return to the ordained Ministry of this Church, the Bishop shall require a promise in writing to all things to the Discipline of this Church without recourse to any other ecclesiastical jurisdiction or foreign civil jurisdiction, and shall further require the person to subscribe and make in the present of the Presiding Bishop and two or more Bishops the declaration required in Article VIII of the Constitution.*

*(d) Thereafter the Presiding Bishop, being satisfied of the person's theological qualifications and soundness in the faith, taking into account the facts and circumstances surrounding the person's removal and release, may permit, with the advice and consent of the Advisory Council to the Presiding Bishop, the return of the person into the ordained Ministry of this Church.*

(e) No one shall be permitted to return to the ordained Ministry of this Church under this Canon less than 12 months from the date of having most recently become a communicant of this Church unless the Presiding Bishop and a majority of the members of the Advisory Council to the Presiding Bishop conclude that special circumstances exist to merit such return which will benefit the needs of this Church.

(f) Notice of the person's return to the ordained Ministry of this Church shall be provided in writing to the same persons and entities receiving notice under Canon III.12.7(c).

EXPLANATION

These amendments provide a consistent canonical process by which Bishops, Priests, and Deacons who have been released and removed from the ordained ministry of this Church can resume the ordained ministry of this Church. Presently there is no consistent canonical process by which those persons can return to that Ministry. Many dioceses have created their own *ad hoc* processes to address this issue. However, these processes have lacked canonical consistency and have given rise to confusion within dioceses faced with members of the clergy seeking to return to ordained Ministry in this Church.

The proposed amendments incorporate three elements into the process of reentering the Church: (1) A proven call from the community, as evidenced by support from members of the candidate's own order of ministry; (2) The consent of the Bishop of the diocese in which the candidate was last canonically resident; and (3) An agreement to undergo such testing or other examination as the consenting Bishop would deem appropriate. The "return process" provided for in these proposed amendments essentially reverses the existing release and removal process.

E. A121: AMEND CANON III.9.4(D)

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.9.4(d) is hereby amended to read as follows:

Sec. 9.4(d) If a Priest has been called to a Cure in a congregation in another Diocese, the Priest shall present Letters Dimissory. The Ecclesiastical Authority of the Diocese shall accept Letters Dimissory within three months of their receipt unless the Bishop or Standing Committee has received credible information concerning the character or behavior of the Priest concerned which would form grounds for canonical inquiry and ~~presentment proceedings~~ under Title IV. In such a case, the Ecclesiastical Authority shall notify the Ecclesiastical Authority of the Diocese in which the Priest is canonically resident and need not accept the Letters Dimissory unless and until the Priest shall be exculpated. The Ecclesiastical Authority shall not refuse to accept Letters Dimissory based on the applicant's race, color, ethnic origin, sex, national origin, marital status sexual orientation, disabilities, or age.

EXPLANATION

This amendment removes the pre-2009 reference to Title IV "Presentment" and substitutes updated language.

F. A122: AMEND CANON III.12.3(A)(2)

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.12.3(a)(2) is hereby amended to read as follows:

(2) If no visitation has occurred in a congregation for three years, the Bishop Diocesan or the Member of the Clergy in charge and Vestry or comparable body may apply to the Presiding Bishop to appoint five Bishops Diocesan who live nearest to the Diocese in which such Congregation is situated as a Council of Conciliation. The Council shall determine all matters of difference between the parties, and each party shall conform to

the decision of the Council; *provided*, that, in case of any subsequent ~~trial-disciplinary proceedings~~ of either party for failure to conform to the decision, any right of the Respondent under the Constitutions and Canons of this Church or the Diocese holding the ~~trial-disciplinary proceedings~~ may be pleaded and established as a sufficient defense, notwithstanding the former decision; and *provided*, further, that, in any case, the Bishop may at any time apply for such Council of Conciliation.

EXPLANATION

This amendment removes the pre-2009 reference to Title IV “trial” and substitutes updated language.

**G. A123: AMEND CANON III.11.3(A)**

Resolved, the House of \_\_\_\_\_ concurring, That the paragraph following the testimonial in Canon III.11.3(a) be amended as follows:

**Sec. 3(a)** The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of convention of the Diocese, bearing a statement of receipt of:

- (1) evidence of the Bishop-elect’s having been duly ordered Deacon and Priest;
- (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. Each Standing Committee, in not more than one hundred twenty days after the sending by the electing body of the certificate of 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(b)~~ 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

This amendment corrects a referencing error that was created when the Canon was amended in 2012.

**H. A124: AMEND TITLE IV**

**1. Amend Canon IV.2: Definitions: Advisor, Agreements, Church Attorney, Investigator, Procedural Officer, and Respondent**

*Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.2, definitions of “Advisor,” “Agreements,” “Church Attorney,” “Investigator,” “Procedural Officer,” and “Respondent” are hereby amended to read as follows:*

**Accord** shall mean a written resolution, which is negotiated and agreed among the parties resulting from an agreement for discipline under Canon IV.9, conciliation under Canon IV.10 or a Conference Panel proceeding under Canon IV.12. All Accords shall meet the requirements of Canon IV.14.

**Administrative Leave** shall mean a restriction on ministry in which the exercise of the Respondent’s ministry is suspended in its entirety during the period of the Administrative Leave and may include suspension from any ecclesiastical and related secular office.

**Advisor** shall mean a person *familiar with the provisions and objectives of this Title who is designated to support, assist, consult with, advise and, where expressly so authorized under this Title, speak for a Complainant or Respondent in any matter of discipline under this Title, as provided in Canon IV.19.10.*

**Agreements** *regarding terms of discipline shall in all cases be incorporated into an Accord and shall not constitute a separate instrument under this Title IV, but shall be and become an Accord and reported accordingly under Canon IV.14.12.*

**Church Attorney** shall mean one or more attorneys selected pursuant to Diocesan Canons to represent the Church in proceedings as provided in this Title. The Diocesan Canons may provide a process for the removal of a Church Attorney for cause. A Church Attorney shall perform all functions on behalf of the Church necessary to advance proceedings under this Title and shall have the following powers, in addition to the powers and duties otherwise provided in this Title: (a) to receive and review the Intake Officer’s report; (b) to conduct investigations and oversee the Investigator and, in connection with such investigations; to have access to the personnel, books and records of the Diocese and its constituent parts; and to receive and review the reports of the Investigator; (c) to determine, in the exercise of the Church Attorney’s discretion, whether the reported information, if true, would be grounds for discipline; and (d) to exercise discretion consistent with this Title and the interests of the Church by declining to advance proceedings or by referring any matter back to the Intake Officer or the Bishop Diocesan for pastoral response in lieu of disciplinary action. In representing the Church, a Church Attorney may consult with ~~the Conference Panel~~ *the President*

*of the Disciplinary Board at any time after the matter has been referred out of the Reference Panel, and, when the prosecution of the case may impact the mission, life, or ministry of the Church, with the Bishop Diocesan.*

**Clear and Convincing** shall mean proof sufficient to convince ordinarily prudent people that there is a high probability that what is claimed actually happened. More than a preponderance of the evidence is required but not proof beyond a reasonable doubt.

**Community** shall mean that part of the Church in which a Member of the Clergy performs his or her ministry, such as a Diocese, Parish, Mission, school, seminary, hospital, camp or any similar institution.

**Complainant** shall mean (a) any person or persons from whom the Intake Officer receives information concerning an alleged Offense and who, upon consent of that person(s), is designated a Complainant by the Intake Officer or (b) any Injured Person designated by the Bishop who, in the Bishop Diocesan's discretion, should be afforded the status of a Complainant; provided, however, that any Injured Person so designated may decline such designation.

**Conciliator** shall mean a person appointed to seek the resolution of a matter under Canon IV.10.

**Conduct Unbecoming a Member of the Clergy** shall mean any disorder or neglect that prejudices the reputation, good order and discipline of the Church, or any conduct of a nature to bring material discredit upon the Church or the Holy Orders conferred by the Church.

**Conference Panel** shall mean a panel of one or more members of the Disciplinary Board selected by the president of the board, unless some other manner of selection is provided by Diocesan Canon, to serve as the body before which an informal conference is held as provided in Canon IV.12, provided, however that no such member of the Conference Panel may serve as a member of the Hearing Panel in the same case. The president of the Disciplinary Board shall be ineligible to serve on the Conference Panel. If the Conference Panel consists of more than one member, it shall include both clergy and lay members.

**Disciplinary Board** shall mean the body provided for in Canon IV.5.1.

**Discipline of the Church** shall be found in the Constitution, the Canons and the Rubrics and the Ordinal of the Book of Common Prayer.

**Doctrine** shall mean the basic and essential teachings of the Church and is to be found in the Canon of Holy Scripture as understood in the Apostles and Nicene Creeds and in the sacramental rites, the Ordinal and Catechism of the Book of Common Prayer.

**Hearing Panel** shall mean a panel of three or more members of the disciplinary Board and shall include both clergy and lay members selected by the president of the Board, unless some other manner of selection is provided by Diocesan Canon, to serve as the body before which a hearing is held as provided in Canon IV.13, provided, however, that no such member of the Hearing Panel may serve as a member of the Conference



Panel in the same case. The president of the Disciplinary Board shall be ineligible to serve on the Hearing Panel.

**Injured Person** shall mean a person, group or Community who has been, is or may be affected by an Offense.

**Intake Officer** shall mean one or more persons designated by the Bishop Diocesan after consultation with the Disciplinary Board, unless otherwise selected pursuant to diocesan canons, to whom information regarding Offenses is reported.

**Investigator** shall mean a person having (a) sufficient knowledge, skill, experience and training to conduct investigations under this Title and (b) familiarity with the provisions and objectives of this Title. Investigators shall be appointed by the Bishop Diocesan in consultation with the president of the Disciplinary Board. *The Investigator acts under the direction of the Reference Panel until a referral is made pursuant to Canon IV.11.3; after such referral, the Investigator shall be overseen by and report to the Church Attorney.*

**Member of the Clergy** shall mean Bishops, Priests and Deacons of the Church.

**Offense** shall mean any act or omission for which a Member of the Clergy may be held accountable under Canons IV.3 or IV.4.

**Order** shall mean a written decision of a Conference Panel or a Hearing panel which is issued with or without the Respondent's consent. All orders shall meet the requirements of Canon IV.14.

**Pastoral Direction** shall mean a written direction given by a Bishop to a Member of the Clergy which meets the requirements of Canon IV.7.

**Pastoral Relationship** shall mean any relationship between a Member of the Clergy and any lay person to whom the Member of the Clergy provides or has provided counseling, pastoral care, spiritual direction or spiritual guidance, or from whom such member of the Clergy has received information within the Rite of a Penitent.

**Privileged Communication** shall mean any communication or disclosure made in confidence and with an expectation of privacy (a) within the Rite of Reconciliation of a Penitent; (b) between a client and the client's attorney; (c) between a Respondent and an Advisor or a Complainant and an Advisor; (d) between persons in a relationship in which communications are protected by secular law or Diocesan Canons; or (e) between and among a Conciliator and participants in a conciliation under Canon IV.10.

**Procedural Officer** shall mean a person learned in the law, experienced in litigation and having familiarity with the provisions and objectives of this Title. *The Procedural Officer shall be appointed annually by the Bishop Diocesan in consultation with the President of the Disciplinary Board.*

**Provincial Court of Review** shall mean a court organized and existing as provided in Canon IV.5.4 to serve as the body which performs the duties prescribed in Canon IV.15.

**Reference Panel** shall mean a panel composed of the Intake Officer, the Bishop diocesan and the president of the disciplinary Board to serve as the body which performs the duties prescribed in Canons IV.6 and IV.11.

**Respondent** shall mean any Member of the Clergy (a) who is the subject or a matter referred for conciliation or to the Conference Panel or to the Hearing Panel; (b) whose ministry has been restricted; (c) who has been placed on Administrative Leave; (d) who is the subject of an investigation and is asked by an investigator or by the Bishop Diocesan to provide information or to make a statement; (e) who agreed with the Bishop Diocesan regarding terms of discipline pursuant to Canon IV.9; or (f) *any Member of the Clergy who requests a review pursuant to Canon IV.7.10.*

**Sexual Abuse** shall mean any Sexual Behavior at the request of, acquiesced to or by a person eighteen years of age or older and a person under eighteen years of age, in high school or legally incompetent.

**Sexual Behavior** shall mean any physical contact, bodily movement, speech, communication or other activity sexual in nature or that is intended to arouse or gratify erotic interest or sexual desires.

**Sexual Misconduct** shall mean (a) Sexual Abuse or (b) Sexual behavior at the request of, acquiesced to or by a Member of the Clergy with an employee, volunteer, student or counselee of that Member of the Clergy or in the same congregation as the Member of the Clergy, or a person with whom the Member of the Clergy has a Pastoral Relationship.

EXPLANATION

These amendments (i) impose a minimum qualification for training to ensure that an Advisor has a basic understanding of the Title IV process, to prevent an unqualified Advisor from misleading his or her charge or to disrupt the Title IV process and allows each diocese can determine how to ensure that each Advisor obtains and maintains as least that basic level of competency; (ii) add a new definition to clarify that an Agreement is the predecessor step to and is incorporated into a formal Accord, as an Agreement is not a distinct remedy or instrument but is part of the process of reaching an Accord; (iii) clarify under what circumstances the Church Attorney may consult with the President of the Disciplinary Board and the Bishop Diocesan, because in developing strategy for a matter, the Church Attorney may need the insights and special knowledge of the Board President or Bishop Diocesan, particularly as it may affect others in the Church; (iv) assign appropriate oversight of the Investigator's work which oversight is particularly critical if outside vendors are used and thus for officials in the Title IV process to determine and monitor the appropriate scope, timeliness, and cost of the investigator's work in each matter; (v) provide for the establishment of a procedural officer, which aids in the prompt and proper disposition of procedural motions and challenges which is essential in the administration of Title IV Proceedings, which Procedural Officer will serve as a consultant or resource to the Hearing Panel in providing a prompt disposition of such motions and moving the matter forward as Hearing Panels often do not have a member(s) who is experienced in the disposition of procedural motions; and (vi) expressly include in the definition of Respondent a Member of the Clergy who requests a review of a Pastoral Direction that includes a Restriction on Ministry or Administrative Leave, which thus makes this definition consistent with Canon IV.7.10, which specifically identifies as a Respondent the Clergy Member who requests the review and also triggers various due process procedures such as the right to have an Advisor appointed.

**2. A125: AMEND CANON IV.5.3(G) QUALIFICATION OF CLERK**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.5.3(g) is hereby amended to read as follows:

(g) The Disciplinary Board shall appoint a clerk who may be a member of the Board, who shall be custodian of all records and files of the Disciplinary Board and who shall provide administrative services as needed for the functioning of the Board. *The clerk, or an assistant clerk who may be appointed at the discretion of the Board, may be any person otherwise qualified who has no conflict of interest in the matter before the Board and who is not barred from serving on the Disciplinary Board under the provisions of IV.5.3(c) or serving on the staff of persons so barred.*

**EXPLANATION**

This resolution provides clarity as to the qualifications of the person to be appointed clerk by the Disciplinary Board.

**3. A126: AMEND CANON IV.5.3(J) RESIDENCE OF CHURCH ATTORNEYS, INTAKE OFFICERS, ADVISORS, INVESTIGATORS, CONCILIATORS**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.5.3(j) is hereby amended to read as follows:

(j) Church attorneys, Intake Officers, Advisors, Investigators ~~and~~, Conciliators, *and Procedural Officers* need not reside in or be members of the Diocese proceeding under this Title. Members of the Disciplinary Board shall be members of the Diocese in which they serve unless such Diocese has entered into an agreement for the sharing of resources as provided in Canon 4.5.3(i).

**EXPLANATION**

This amendment clarifies that the Procedural Officer can be from any diocese of the Church to enlarge the potential pool of qualified individuals.

**4. A127: AMEND CANON IV.5 — ADD CANON IV.5.4 AND RENUMBER CURRENT (FORMER) CANON IV.5.4 AS IV.5.5**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.5 is hereby amended by adding Canon IV.5.4 to read as follows:

**Sec. 4(a)** *The President of the Hearing Panel shall have the authority, upon reasonable notice, to impose sanctions on the Respondent, the Respondent’s counsel, or the Church Attorney, for conduct that the President deems to be disruptive, dilatory, or otherwise contrary to the integrity of the proceedings. If the conduct in question is that of the Respondent’s counsel, notice shall be given to the following: the Respondent, Respondent’s counsel, and Respondent’s Advisor. If the conduct in question is that of the Church Attorney, notice shall be given to each of the Church Attorney, the Bishop Diocesan, and the person or Diocesan body with authority to remove or replace the Church Attorney.*

**Sec. 4(b)** *Sanctions which may be imposed pursuant to Section 5(a) above include but may not be limited to*

- (i) refusing to allow the disobedient party to support or oppose claims or defenses;*
- (iii) striking claims or defenses or responses; or*
- (iv) disqualification of counsel.*

**Sec. 4(c)** *Within 10 days of the imposition of sanctions under this section, the sanctioned party may appeal the sanction to the Disciplinary Board (excluding the members of the Hearing Panel). The President of the Disciplinary Board shall establish a hearing date and convene the Disciplinary Board members, within 20 days,*

*either personally or telephonically, to consider the appeal. The Disciplinary Board shall issue its ruling within three days of conclusion of the hearing. The ruling of the Disciplinary Board cannot be the subject of an interlocutory appeal.*

EXPLANATION

This amendment adds a new section to provide express authority for imposition of sanctions upon a party for disruption to the Title IV process. Those surveyed expressed the need for some type of negative consequences to stop demonstrated misuse and disruption of the Title IV process, and thus to reduce the consequent increase in time and cost to all the parties to a proceeding.

**5. A128: AMEND CANON IV.6.3 MANDATORY REPORTING BY BISHOP**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.6.3 be amended to read as follows:

**Sec. 3.** Any person other than the Intake Officer who receives information regarding an Offense shall promptly forward the information to the Intake Officer. A Bishop Diocesan ~~may~~*shall* forward information to the Intake Officer whenever the Bishop diocesan believes that the information may indicate conduct constituting one or more Offenses.

EXPLANATION

This amendment clarifies that the Bishop Diocesan has an affirmative duty to forward information to the Intake Office. The canon would substitute the discretionary “may” to “shall” to address complaints that Bishops could bypass or misuse the Title IV process by selectively withholding information that should reasonably be the subject of the more objective evaluation of the complaint in the Title IV process.

**6. A129: AMEND CANONS IV.6.5, IV.6.6 AND IV.19.10(B) NOTICE OF DISMISSAL AND APPEAL MATTERS**

Resolved, the House of \_\_\_\_\_ concurring, That Canons IV.6.5 and IV.6.6 be amended to read as follows:

**Sec. 5.** If the Intake Officer determines that the information, if true, would not constitute an Offense, the Intake Officer shall inform the Bishop Diocesan of an intention to dismiss the matter. If the Bishop Diocesan does not object, the Intake Officer shall dismiss the matter. The Intake Officer shall provide written notice to the Complainant, *the subject Member of the Clergy*, and the Bishop Diocesan of the decision of dismissal, the reasons therefor, and the Complainant’s right to appeal the decision within thirty days of the date of the notice and shall send a copy of that notice and the written intake report to the president of the Disciplinary Board. ~~If the Complainant wishes to appeal the dismissal, the intake Officer shall assist the Complainant in preparing and signing a written statement of the acts complained of, which statement shall be sent by the Intake Officer to the president of the Disciplinary Board, along with a statement that the Complainant appeals the dismissal.~~ *the Bishop shall appoint an Advisor for the Complainant within 15 days of the date of the notice of dismissal. The Advisor shall assist the Complainant in preparing and signing a written statement of the acts complained of, which statement shall be sent by the Advisor to the president of the Disciplinary Board, along with a statement that the Complainant appeals the dismissal.* The intake report and any related information, in the case of a dismissal, shall be retained by the Intake Officer and may be considered in connection with any additional information that may come to the Intake Officer thereafter concerning the subject Member of the Clergy.

**Sec. 6.** In the event of an appeal of a dismissal, the president of the Disciplinary Board shall, within thirty days of the receipt of the appeal, review the intake report and either affirm or overrule the dismissal. The president shall promptly notify the Complainant, *the subject Member of the Clergy*, the Intake Officer, and the

Bishop Diocesan of the decision. If the decision is to overrule the dismissal, the president shall refer the intake report to the Reference Panel *within 15 days*; and be it further

Resolved, That Canon IV.19.10(b) be amended to read as follows:

(b) The Bishop Diocesan shall make an Advisor available to the Complainant not later than the earliest of (1) the forwarding of the intake report to the Reference Panel, (2) ~~the Complainant's appeal of 15 days after the Complainant receiving word of a dismissal under Canon IV.6.5,~~ (3) the Respondent or Bishop Diocesan proposing terms of discipline to the other under Canon IV.9, or (4) the Bishop's designation of an Injured Person as a Complainant.

EXPLANATION

This amendment removes from the Intake Officer the duty to assist the Complainant in drafting an appeal from the Intake Officer's own dismissal of the Complaint and substitutes an Advisor to assist the Complainant in perfecting the appeal process.

The change also ensures that the Member of the Clergy (who is not yet a Respondent) gets notice of the dismissal and the decision on any appeal of the dismissal. The change also adds appropriate deadlines and procedures to ensure prompt implementation of the dismissal and appeal process.

7. A130: AMEND CANON IV.6.7 NOTICE OF COMPLAINT TO CLERGY

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.6.7 is amended to read in full as follows:

**Sec. 7.** If the Intake Officer determines that the information, if true, would constitute an Offense, the Intake Officer shall promptly forward the intake report to the Reference Panel. The president shall promptly select from the Disciplinary Board, a Conference Panel and a Hearing Panel, and shall designate a president of each Panel. *At the same time as forwarding the intake report to the Reference Panel, the Intake Officer shall send a notice to the subject Member of the Clergy informing him or her of the nature of the alleged Offense(s), the identity of the Complainant, and describing the next procedural steps that the Member of the Clergy can anticipate.*

EXPLANATION

This amendment clarifies that the subject Member of the Clergy (who is not yet a Respondent) gets prompt notice of basic information about the Complaint and the Title IV process. The change seeks to address due process and pastoral concerns about withholding or delaying such information from the subject of the Complaint.

8. A131: AMEND CANON IV.6.8 PROGRESS AND ACCOUNTABILITY

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.6.8 be amended to read in full as follows:

**Sec. 8.** The Reference Panel shall meet as soon as possible after receiving the intake report to determine how to refer the report. Referral options are (a) no action required other than appropriate pastoral response pursuant to Canon IV.8; (b) conciliation pursuant to Canon IV.10; (c) investigation pursuant to Canon IV.11; (d) to the Conference Panel pursuant to Canon IV.12; or (e) referral for possible agreement with the Bishop Diocesan regarding terms of discipline pursuant to Canon IV.9. Referral decisions shall require the approval of a majority of the Reference Panel. *The Reference Panel shall monitor the progress of each referral on a*

monthly basis to ensure that the matter is progressing in a timely fashion. If the Reference Panel determines that the matter has reached an impasse or is not progressing in a timely fashion, it may re-refer the matter.

EXPLANATION

This amendment imposes timelines and oversight details to ensure that referrals by the Reference Panel are monitored and promptly acted upon. The change addresses concerns about undue delay and the need to identify who is responsible to ensure that a matter is not languishing, and for the Reference Panel to act make an alternative referral if needed.

**9. A132: AMEND CANON IV.6.9 TIME TO REACH AN AGREEMENT**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.6.9 be amended to read in full as follows:

Sec. 9. If the determination of the Reference Panel is to take no action other than an appropriate pastoral response, the Panel shall notify the Complainant and the subject Member of the Clergy of the determination and the basis for the determination to take no action other than an appropriate pastoral response. If the referral is to conciliation, the provisions of Canon IV.10 shall apply. If the referral is to investigation, the provisions of Canon IV.11 shall apply. *If the referral is to the Bishop Diocesan for possible Agreement and an Agreement is not reached within 90 days of the referral, the Reference Panel will re-refer the matter, in accordance with Canon IV.6.8.*

EXPLANATION

This amendment imposes a 90-day deadline for action in a referral to the Bishop Diocesan for an Agreement. The change will ensure that the Complaint does not languish and that the Title IV process stays on track for a prompt resolution.

**10. A133: AMEND CANON IV.7.4 CLARIFICATION OF COMPENSATION UNDER RESTRICTION**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.7.4 be amended to read as follows:

Sec. 4. Any restriction on ministry imposed pursuant to Canon IV.7.3(a) or placement on Administrative Leave pursuant to Canon IV.7.3(b) must (a) be made in writing; (b) set forth clearly the reasons for which it is issued; (c) set forth clearly the limitations and conditions imposed and the duration thereof; (d) *set forth clearly terms of compensation, if any;* (e) be neither capricious nor arbitrary in nature nor in any way contrary to the Constitution and Canons of the General Convention or the Diocese; (f) be promptly served upon the Member of the Clergy; and (g) advise the Member of the Clergy of his or her right to be heard in the matter as provided in this Canon. A copy of such writing shall be promptly provided to the Church Attorney.

EXPLANATION

This amendment requires that the issue of compensation, if any, for the subject Member of the Clergy be addressed in a Pastoral Direction that contains a restriction on ministry or Administrative Leave. Failure to address this critical issue causes undue hardship on the congregations and Members of the Clergy involved in the process.

**11. A134: AMEND CANON IV.12.12 MOVE TO 14.8**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.12.12 be amended to read as follows:

**Sec. 12.** The Respondent or the Church Attorney may object to an Order issued by the Conference Panel by giving written notice of the objection to the president of the Conference Panel, ~~within fifteen days following~~

~~the effective date of the Order as defined in Canon IV.14.10. Upon receipt of the notice of objection, the president of the Conference Panel shall notify the president of the Disciplinary Board of the objection and the matter will proceed as provided in Canon IV.14.11. and the other party(ies) in accordance with Canon IV. 14.8.~~

EXPLANATION

This amendment clarifies which parties must get notice of an objection to a Conference Panel Order. The change is consistent with the list in Canon IV.14.8 of parties entitled to notice of the Bishop's decision to adopt or modify the Sentence in the Order.

**12. A135: AMEND CANON IV.13 PROCEDURAL MATTERS AND DISCOVERY**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.13 be amended to read as follows:

Sec. 1. ~~If~~ *When the Conference Panel decides to refer a matter is referred to the Hearing Panel, the president of the Conference Panel shall within three days of that decision promptly notify the president of the Disciplinary Board and the Church Attorney of the referral.*

Sec. 2. ~~Upon~~ *Within 10 days of receipt of a referral for Hearing Panel proceedings, the Church Attorney shall review all information acquired as of the time of such referral and, if necessary, shall revise or update the statement of the alleged Offense and shall provide the same to the Hearing Panel. provide to the Hearing Panel the statement of the alleged Offense(s), updated as needed. No other material from any prior proceedings under Title IV shall be provided to the Hearing Panel. Upon receipt of the Church Attorney's communication, the Hearing Panel shall within seven days issue a notice to the Respondent, to the Respondent's Advisor, to Respondent's counsel, if any, and to the Church Attorney.*

(a) The notice shall describe the nature and purpose of the proceeding, contain a copy of the written statement prepared by the Church Attorney, disclose the names of all persons to whom the notice is sent, advise the Respondent that a written response to the notice must be filed by the Respondent with the Hearing Panel within thirty days of the mailing date of the notice and advise the Respondent ~~that failure to attend or participate in a scheduled or noticed hearing may result in a finding of default of the provisions of Canon IV.19.6.~~

(b) A copy of the notice shall be sent to the Complainant and to the Complainant's Advisor.

(c) Unless additional time is approved for good cause by the Hearing Panel, the Respondent shall *within 30 days of the mailing date of the notice file with the Hearing Panel and deliver to the Church Attorney a written response signed by the Respondent within thirty days of the mailing date of the notice. The president of the Hearing Panel shall forward a copy of the response to the Church Attorney.*

Sec. 3. ~~In all proceedings before the Hearing Panel, the Church Attorney shall appear on behalf of the Diocese, which shall then be considered the party on one side and the Respondent the party on the other. Each Complainant shall be entitled to be present throughout and observe the Hearing and each may be accompanied by another person of his or her own choosing in addition to his or her Advisor.~~

~~Sec. 4. All proceedings before the Hearing Panel, except its private deliberations, shall be public, provided, however, that the Hearing Panel may close any part of the proceedings at its discretion to protect the privacy of any person. A record of the hearing shall be made by such means as to enable the creation of a written transcript of the hearing.~~

Sec. 53. The Church Attorney and the Respondent shall each be afforded reasonable time and opportunity to ~~prepare evidence~~ *discover evidence in preparation* for the hearing as follows:

~~(a) Within thirty-sixty days after the filing and delivery of the response by the Respondent, the Church Attorney and the Respondent's counsel shall meet and confer regarding the nature and basis of the allegations against the Respondent and the defenses thereto and to make or arrange for initial disclosures as described in Canon IV.13.5(b) and to develop a proposed plan of discovery forms and schedule for approval by the Hearing Panel. A report of the proposed plan shall be filed with the president of the Hearing Panel within fifteen days after the conference.~~

~~(b) Within fifteen days after the conference described in Canon IV.13.5(a), the Church Attorney and the Respondent's counsel shall each provide to the other *initial a mandatory d*Disclosure of all evidence known to them that would tend to prove or disprove the allegations against the Respondent, including but not limited to (1) the name and, if known, the address and telephone number of each individual likely to have direct knowledge of information which may be used to support the allegations against the Respondent or the defenses thereto, together with a detailed summary of the expected testimony of the person, if called to testify; and (2) a copy of, or a description by category and location of, all documents and tangible things that may be used to support the allegations against the Respondent or the defenses thereto, except as such disclosure would involve Privileged Communications. *The parties must supplement mandatory disclosures made under this section as additional information becomes known. Documents and tangible items identified in the mandatory disclosures that are in the possession of a party shall be produced upon request. The Hearing Panel may, upon request of a party or Injured Person, enter an order limiting production of documents or tangible items of a sensitive nature.*~~

~~(b) A party claiming that any communication is privileged must provide a log containing the date of the communication, a list of all persons party to the communication, and a short description of the communication. Disputes over the scope of the privilege may be raised with the Hearing Panel.~~

~~(c) The Church Attorney and Respondent's counsel may each also serve on the other up to 20 Requests for Admission at any time within the 60-day period for mandatory disclosures or within 15 days after that 60-day period. A party upon whom a Request for Admission is served must respond by admitting or denying the Request within 30 days of service, and failure to so respond shall be deemed an admission. Where extraordinary circumstances prevent a party from providing a timely response to a Request for Admission, the party may seek relief from the Hearing Panel, which, at its discretion, may grant such relief. If the discovery plan has been mutually agreed upon by the Church Attorney and counsel for the Respondent, the president of the Hearing Panel may approve the plan and incorporate it in a discovery order and scheduling order governing all discovery procedures and establishing a date for hearing of the matter. If the Church Attorney and Respondent's counsel do not agree on all elements of the discovery plan, the president of the Hearing Panel shall allow each to be heard with respect to the elements in dispute, make a determination of appropriate discovery procedures and issue a discovery order and scheduling order within thirty days of the receipt of the discovery planning report.~~



(d) *The Church Attorney and Respondent's counsel may each take two depositions without prior permission of the Hearing Panel.*

~~(e) No other discovery shall be allowed at any point during the pendency of a matter under this Title except with permission of the Hearing Panel upon a showing of extraordinary circumstances. Discovery procedures as approved in the discovery plan filed pursuant to Canon IV.13.5(a) may include written interrogatories, oral or written deposition testimony of any person having knowledge pertaining to the alleged Offense or any defenses, requests for production of documents or tangible objections, and requests for admissions of fact.~~

~~(e) In addition to the disclosures required by this section and the discovery obtained pursuant to the discovery plan, the Church Attorney and Respondent's counsel shall each provide to the other and to the Hearing Panel at least thirty days before the hearing final pre-hearing disclosures including (1) the name, address and telephone number of each witness expected to be called to testify at the hearing; (2) identification of each document or other tangible object expected to be used as an exhibit in the hearing; and (3) requests, if any, to have all or portions of the hearing closed to the public.~~

~~(f) Notwithstanding any provision of this section, in approving or determining the discovery plan, the president of the Hearing Panel shall take reasonable steps to assure that the discovery process will not unduly burden any person from whom information is sought or unduly adversely affect any pastoral response being offered to any such person. The Hearing Panel may impose, after reasonable notice and opportunity to be heard, reasonable sanctions on any party for failure to comply with any discovery or scheduling order pursuant to the provisions of Canon IV.5.5.~~

*Sec. 4. In all proceedings before the Hearing Panel, the Church Attorney shall appear on behalf of the Diocese, which shall then be considered the party on one side and the Respondent the party on the other.*

*Sec. 5. All pre-hearing motions and challenges shall be timely filed with the Hearing Panel. All responses shall be filed by the non-moving party within 15 days of receipt of the motion or challenge. Upon receipt of a motion or challenge, the Hearing Panel may consult with the Procedural Officer or refer the motion or challenge to the Procedural Officer for determination. Upon receipt of a motion or challenge, the Hearing Panel will promptly set the matter for hearing. The hearing may be conducted by conference call. After consideration of the argument of the parties, the Hearing Panel or the Procedural Officer, whoever conducted the hearing, shall render a decision within three days of the hearing. The decision shall be final as to all procedural matters. Decisions on evidentiary matters are preliminary and may be reconsidered by the Hearing Panel during the course of the hearing if warranted by the evidence. A decision by the Procedural Officer shall be provided to the parties and the President of the Hearing Panel.*

*Sec. 6. All proceedings before the Hearing Panel except its private deliberations shall be open to the Respondent and to each Complainant, to any Injured Person, and to persons from the public. Each Complainant shall be entitled to be present throughout and observe the Hearing and each may be accompanied at the proceedings by another person of his or her own choosing in addition to his or her Advisor. Notwithstanding the above, the Hearing Panel, at its discretion and for good cause, including to protect the privacy of any person, may close any part of the proceedings to any person or group of persons, after consultation with the Church Attorney, the*

*Respondent's counsel and, where appropriate, the Bishop Diocesan. A record of the hearing shall be made by such means as to enable the creation of a written transcript of the hearing.*

Sec. 7. At least 15 days before the hearing, the Church Attorney and Respondent's counsel shall each provide to the other and to the Hearing Panel final pre-hearing disclosures including (1) the name, address, and telephone number of each witness expected to be called to testify at the hearing; (2) identification of each document or other tangible object expected to be used as an exhibit in the hearing; and (3) requests, if any, to have all or portions of the hearing closed to the public.

Sec. 8. In all proceedings of the Hearing Panel, the testimony of witnesses shall be taken orally and personally or by such other means as provided by order of the Hearing Panel. All testimony shall be given under oath or solemn affirmation and be subject to cross-examination. The Hearing Panel shall determine the credibility, reliability and weight to be given to all testimony and other evidence. The proceedings shall be conducted as follows:

(a) The president shall regulate the course of the hearing so as to promote full disclosure of relevant facts.

(b) The president:

(1) may exclude evidence that is irrelevant, immaterial or unduly repetitious;

(2) shall exclude privileged evidence;

(3) may receive documentary evidence in the form of a copy or excerpt if the copy or excerpt contains all pertinent portions of the original document;

(4) may take official notice of any facts that could be judicially noticed, including records of other proceedings and of technical or scientific facts within the Hearing Panel's specialized knowledge;

(5) may not exclude evidence solely because it is hearsay;

(6) shall afford to the Church Attorney and to the Respondent reasonable opportunity to present evidence, argue and respond to argument, conduct cross-examination and submit rebuttal evidence; and

(7) may, at the discretion of the Hearing Panel, give persons other than the Church Attorney and the Respondent opportunity to present oral or written statements at the hearing.

(c) Nothing in this section shall preclude the exercise of discretion by the president in taking measures appropriate to preserve the integrity of the hearing.

Sec. 7 9. Following the conclusion of the hearing, the Hearing Panel shall confer privately to reach a determination of the matter by (a) dismissal of the matter or (b) issuance of an Order.

Sec. 8 10. If the determination is to dismiss the matter, the Hearing Panel shall issue an Order which shall include the reasons for dismissal and which may contain findings exonerating the Respondent. A copy of the Order shall be provided to the Bishop Diocesan, the Respondent, the Respondent's Advisor, the Complainant, the Complainant's Advisor, and the Church Attorney.

Sec. 9 11. If the resolution is the issuance of an Order other than an Order of dismissal, the provisions of Canon IV.14 shall apply.

**EXPLANATION**

This amendment adds significant detail to guide the members of the Hearing Panels and the parties in evidentiary hearings. The change adds more specific deadlines to critical steps in the process, to prevent the process from languishing.

The change provides for notice to the Church Attorney of a referral to the Hearing Panel. The change clarifies that the Church Attorney initially provides the Hearing Panel only with a summary statement, not all the supporting documentation. The change requires that the Respondent be given notice of the consequences of his or her failure to appear.

The change mandates initial and supplemental disclosure of relevant documents and other evidence to the other party. The change permits the Hearing Panel to limit disclosure of facts of sensitive nature and to protect privacy rights. The change requires a privilege log to document claimed privileged communications. The change permits limited requests for admissions and depositions and that the Hearing Panel may expand discovery upon extraordinary circumstances.

The change provides for the utilization of a Procedural Officer to assist in the prompt disposition of procedural matters. The change provides a process for imposition of sanctions for discovery abuse. The change clarifies that at the Hearing Panel the parties are the Diocese, represented by the Church Attorney, and the Respondent. The change provides generally for open public proceedings in the Hearing Panel stage with a process to close the proceedings as required to protect privacy interests of any persons as appropriate. The change provides for pre-hearing disclosures — e.g., witness lists and exhibits — to be exchanged by the parties.

**13. A136: AMEND CANON IV.14.4 DISTRIBUTION OF ACCORD**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.14.4 be amended to read as follows:

Sec. 4. A copy of the Accord shall be sent to the Complainant, the Complainant's Advisor, the Respondent, the Respondent's Advisor, the Respondent's counsel, if any, the Church Attorney and the Bishop Diocesan by the Conciliator or the president of the Conference Panel ~~or Hearing Panel~~ (whichever the matter was before when the Accord was reached) on the date that the Conciliator or president of the Panel signs ~~date on which the Accord is signed~~. If the Accord was reached between the Bishop Diocesan and Respondent under Canon IV.9, the Bishop Diocesan shall send a copy of the Accord to the persons listed in this Section on the date the Accord becomes effective and irrevocable.

EXPLANATION

This amendment clarifies when a signed Accord must be sent to the parties.

**14. A137: AMEND CANON IV.14.5 MODIFICATION OF TIMES**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.14.5 be amended to read as follows:

Sec. 5. The Bishop Diocesan shall have ~~thirty~~ twenty days from the date on which the Accord is ~~sent to the Bishop Diocesan~~ issued in which to advise in writing the Respondent, the Respondent's Advisor, the Respondent's counsel, if any, the Complainant, the Complainant's Advisor, the Church Attorney and the Conciliator or the president of the Conference Panel or Hearing Panel whether the Bishop Diocesan will pronounce the Sentence or accept the other terms of the Accord as recommended. The Bishop Diocesan shall advise that he or she will (a) pronounce the Sentence as recommended or (b) pronounce a lesser Sentence than that recommended and/or (c) reduce the burden on the Respondent of any of the other terms of the Accord. The Bishop Diocesan shall pronounce Sentence not sooner than ~~forty~~ twenty days following the date on which the Accord is ~~sent to the Bishop Diocesan~~ issued and not later than ~~sixty~~ forty days following such date. The Bishop Diocesan's pronouncement of a lesser Sentence than that recommended or other modification shall not affect the validity or enforceability of the remainder of the Accord. In the case of an Accord under Canon IV.9, the Bishop Diocesan shall pronounce Sentence not sooner than the day after the date the Accord became effective and irrevocable.

EXPLANATION

This amendment provides deadlines for the Bishop Diocesan to act on Accords.

**15. A138: AMEND CANON IV.14.8 SHORTEN TIMES**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.14.8 be amended to read as follows:

Sec. 8. (a) The Bishop Diocesan shall have ~~thirty~~ twenty days from the date of the issuance of the Order in which to advise in writing the Respondent, the Respondent's Advisor, the Complainant, the Complainant's Advisor, the Church Attorney, and the president of the Conference Panel or Hearing Panel (whichever Panel issued the Order) whether the Bishop Diocesan will pronounce the Sentence or accept the other terms of the Order as recommended. The Bishop Diocesan shall advise that he or she will (a) pronounce the Sentence as recommended or (b) pronounce a lesser Sentence than that recommended and/or (c) reduce the burden on the Respondent of any of the other terms of the Order.

(b) *The Respondent or the Church Attorney may object to an Order issued by the Conference Panel by giving written notice of the objection to the president of the Conference Panel and the other party(ies) within 10 days following the issuance date of the Order as defined in Canon IV.14.10. Upon receipt of the notice of objection, the president of the Conference Panel shall notify the president of the Disciplinary Board of the objection and the matter will proceed as provided in Canon IV.14.11.*

(c) The Bishop Diocesan shall pronounce Sentence not sooner than ~~forty~~ twenty days following the issuance of the Order and not later than ~~sixty~~ forty days following the issuance of the Order. Notwithstanding anything in this section to the contrary, no Sentence shall be pronounced while an appeal of the matter is pending. However, the Bishop Diocesan may, while an appeal is pending, place restrictions upon the exercise of the Respondent's ministry, or place the Respondent on Administrative Leave, or continue any such

restriction or Administrative Leave as was in effect at the time of the issuance of the Order. The Bishop Diocesan's pronouncement of a lesser Sentence than that recommended or other modification shall not affect the validity or enforceability of the remainder of the Order.

EXPLANATION

This amendment moves provisions in section (b) from former Canon IV.12.12 regarding objections to Conference Panel Orders. The change also adds more specific deadlines for the Bishop Diocesan's pronouncement of Sentence.

**16. A139: AMEND CANON IV.14.11 ADDING CHURCH ATTORNEY TO COMPORT WITH PARALLEL CANON**  
 Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.14.11 be amended to read as follows:

Sec. 11. If the Order is issued by a Conference Panel, the Respondent or *the Church Attorney* may object to the Order as provided in Canon IV. ~~42.42~~ 14.8 and the matter shall be referred to a Hearing Panel for hearing as provided in Canon IV.13.

EXPLANATION

This amendment permits the Church Attorney to object to Conference Panel Order and corrects the canonical reference for form of objections.

**17. A140: AMEND CANON IV.12 ADD PRESIDENT OF HOUSE OF DEPUTIES AS RECIPIENT OF NOTICE OF ACCORD**  
 Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.14.12 and Canon 14.12(a) be amended to read as follows:

Sec. 12. If there has been no objection by the Respondent or *the Church Attorney to the Order(s)*, notice of Accords and Orders which have become effective shall be given without delay as follows:

(a) In the case of any Accord or Order pertaining to a Priest or Deacon, the Bishop Diocesan shall give notice of the Accord or Order to every Member of the Clergy in the Diocese, each Vestry in the Diocese, the Secretary of Convention, and the Standing Committee of the Diocese, which shall be added to the official records of the Diocese; to the Presiding Bishop, to all other Bishops of the Church, and where there is no Bishop, to the Ecclesiastical Authority of each Diocese of the Church; to *the President of the House of Deputies*; to the Recorder of ordinations; to the Office of Transition Ministry; the Archives; and to the Secretary of the House of Bishops and the Secretary of the House of Deputies.

EXPLANATION

This amendment clarifies that Church Attorney can object to Orders, consistent with other provisions, and adds President of the House of Deputies as a recipient of the notices of Accords and Orders.

**18. A141: AMEND CANON IV.14.12(B) CORRECTION TO REFERENCES TO OFFICE OF TRANSITION MINISTRY**  
 Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.14.12(b) be amended as follows:

(b) In the case of any Accord or Order pertaining to a Bishop, the Presiding Bishop shall give notice of the Accord or Order to the Ecclesiastical Authority of every Diocese of the Church, to the Recorder of ordinations, to the ~~Church Deployment~~ *Office of Transition Ministry*, and to the Secretary of the House of Bishops, and to all Archbishops and Metropolitans, and to all Presiding Bishops of Churches in communion with the Church.

EXPLANATION

The Office of Transition Ministry was formerly known as The Church Deployment Office. The resolution correctly identifies the Office of Transition Ministry as the recipient of a Notice of an Accord or Order.

**19. A142: AMEND CANON IV.15.6(B)(5) STANDARDS FOR APPEAL**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.15.6(b)(5) be amended as follows:

(5) The *Procedural Officer* or the Hearing Panel has committed a procedural error or engaged in a decision-making process contrary to this Title; and/or

EXPLANATION

In the event that the Procedural Officer decides a procedural issue, such decision can be a basis for appeal to the Provincial Court of Review.

**20. A143: AMEND CANON IV.16 CLARIFICATION OF MATTERS CONCERNING ABANDONMENT**

Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.16 be amended as follows:

**(A) By a Bishop**

**Sec. 1.** If the *Disciplinary Board for Bishops* receives information suggesting that a Bishop ~~abandons~~ may have abandoned The Episcopal Church (i) by an open renunciation of the Doctrine, Discipline or Worship of the Church; or (ii) by formal admission into any religious body not in communion with the same; or (iii) by exercising Episcopal acts in and for a religious body other than the Church or another church in communion with the Church, so as to extend to such body Holy Orders as the Church holds them, or to administer on behalf of such religious body Confirmation without the express consent and commission of the proper authority in the Church, *the Board shall promptly notify the Presiding Bishop and the Bishop in question that it is considering the matter. Upon receipt of such notification, the Presiding Bishop may, with the advice and consent of the Advisory Council to the Presiding Bishop, place restrictions on the ministry of the Bishop in question for the period while the matter is under consideration by the Board. If, after consideration of the matter, the Board concludes, by a majority vote of all of its members, that the Bishop in question has abandoned The Episcopal Church, the Board* ~~it shall be the duty of the Disciplinary Board for Bishops, by a majority vote of all of its members, to~~ certify the fact to the Presiding Bishop and with the certificate send a statement of the acts or declarations which show such abandonment, which certificate and statement shall be recorded by the Presiding Bishop. The Presiding Bishop shall then place a restriction on the exercise of ministry of said Bishop until such time as the House of Bishops shall investigate the matter and act thereon. During the period of such restriction, the Bishop shall not perform any Episcopal, ministerial or canonical acts.

**Sec. 2.** The Presiding Bishop, or the presiding officer, shall forthwith give notice to the Bishop of the certification and restriction on ministry. Unless the restricted Bishop, within sixty days, makes declaration by a verified written statement to the Presiding Bishop, that the facts alleged in the certificate are false or utilizes the provisions of Canon III.12.7, the Bishops will be liable to Deposition or Release and Removal. If the Presiding Bishop is reasonably satisfied that the statement constitutes (i) a good faith retraction of the declarations or acts relied upon in the certification to the Presiding Bishop or (ii) a good faith denial that the Bishop made the declarations or committed the acts relied upon in the certificate, the Presiding Bishop, with the advice and consent of the Disciplinary Board for Bishops, shall terminate the restriction. Otherwise, it shall be the duty of the Presiding Bishop to present the matter to the House of Bishops at the next regular or special meeting of the House. The House may, by a majority of the whole number of Bishops entitled to vote, (1) consent to the deposition of the subject Bishop, in which case the Presiding Bishop shall depose the

Bishop from the ordained ministry of The Episcopal Church, and pronounce and record in the presence of two or more Bishops that the Bishop has been so deposed, or (2) consent to the release and removal of the subject Bishop from the ordained ministry of the Episcopal Church, in which case the Presiding Bishop shall declare such release and removal in the presence of two or more Bishops.

**(B) By a Priest or Deacon**

**Sec. 3.** If it is reported to the Standing Committee of the Diocese in which a Priest or Deacon is canonically resident that the Priest or Deacon, without using the provisions of Canon III.7.8-10 or III. 9.8-11, has abandoned The Episcopal Church, *the Standing Committee shall promptly notify the Bishop Diocesan and the Priest or Deacon in question that it is considering the matter. Upon receipt of such notification, the Bishop Diocesan may, with the advice and consent of the Standing Committee, place restrictions on the ministry of the Priest or Deacon in question for the period while the matter is under consideration by the Standing Committee.* ~~then the~~ The Standing Committee shall ascertain and consider the facts, and if it shall determine by a vote of three-fourths of all the members that the Priest or Deacon has abandoned the Episcopal Church by an open renunciation of the Doctrine, Discipline or worship of the Church, or by the formal admission into any religious body not in communion with the Church, or in any other way, it shall be the duty of the Standing Committee of the Diocese to transmit in writing to the Bishop Diocesan, ~~or if there be no such Bishop, to the Bishop Diocesan of an adjacent Diocese,~~ its determination, together with a statement setting out in a reasonable detail the acts or declarations relied upon in making its determination. If the Bishop Diocesan affirms the determination, the Bishop Diocesan shall place a restriction on the exercise of ministry by that Priest or Deacon for sixty days and shall send to the Priest or Deacon a copy of the determination and statement, together with a notice that the Priest or Deacon has the rights specified in Section 2 4 of this Canon and at the end of the sixty-day period the Bishop Diocesan will consider deposing the Priest or Deacon in accordance with the provisions of Section 4.

**Sec. 4.** Prior to the expiration of the sixty-day period of restriction, the Priest or Deacon may utilize the provisions of Canon III.7.8-10 or III.9.8-11, as applicable. If within such sixty day period the Priest or Deacon shall transmit to the Bishop Diocesan a statement in writing signed by the Priest or Deacon, which the Bishop Diocesan is reasonably satisfied constitutes a good faith retraction of such declarations or acts relied upon in the determination or good faith denial that the Priest or Deacon committed the acts or made the declarations relied upon in the determination, the Bishop Diocesan shall withdraw the notice and the restriction on ministry shall expire. If, however, within the sixty day period, the Bishop Diocesan does not declare the release and removal of the Priest or Deacon in accordance with Canon III.7.8-10 or III.9.8-11, as applicable, or the Priest or Deacon does not make retraction or denial as provided above, then it shall be the duty of the Bishop Diocesan either (i) to depose the Priest or Deacon or (ii) if the Bishop Diocesan is satisfied that no previous irregularity or misconduct is involved, with the advice and consent of the Standing Committee, to pronounce and record in the presence of two or more Priests that the Priest or Deacon is released and removed from the ordained Ministry of this Church and from the obligations attendant thereto, and (for causes which do not affect the person's moral character) is deprived of the right to exercise in The Episcopal Church the gifts and spiritual authority conferred in Ordination.

**Sec. 5.** *For the purposes of Section 3 and 4 of this Canon, if there is no Bishop Diocesan, the Standing Committee shall submit the matter to the Bishop Diocesan of an adjacent Diocese, who shall have the authority of a Bishop Diocesan in the matter.*

**EXPLANATION**

The Commission was made aware of concerns about the absence in Canon IV.16, the "abandonment canon," of a requirement that notice be promptly given to a Bishop, Priest, or Deacon who is alleged to have

abandoned the Church that such a matter has been taken under consideration by the Disciplinary Board for Bishops (in the case of a Bishop) or the Standing Committee (in the case of a Priest or Deacon).

A related concern was whether, if such notice were required, there should be a mechanism to provide for the temporary restriction of the ministry of the Bishop, Priest, or Deacon during the pendency of the matter. This amendment adds a requirement of prompt notice, and also authorizes the Presiding Bishop, with the consent of the Presiding Bishop's Advisory Council (in the case of a Bishop), or the Bishop Diocesan, with the consent of the Standing Committee (in the case of a Priest or Deacon), to restrict the ministry of the Bishop, Priest, or Deacon who is alleged to have abandoned the Church during the pendency of the matter before the Disciplinary Board for Bishops or the Standing Committee.

Finally, this amendment clarifies that the role of the Bishop Diocesan in the process for Priests and Deacons set out in Sections 3 and 4 may, if there is no such Bishop, be performed by the Bishop Diocesan of an adjacent diocese selected by the Standing Committee.

**21. A144: AMEND CANON IV.19.4 STATUTE OF LIMITATION FOR PERPETRATORS AND OBSERVERS OF SEXUAL ABUSE**  
Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.19.4(b) be amended to read as follows:

(b) The time limits of Subsection (a) above shall not apply with respect to persons whose acts include physical violence, sexual abuse or sexual exploitation, if the acts occurred when the alleged Injured Person was under the age of twenty-one years; in any such case, proceedings under this Title may be initiated at any time. *This provision excepting the time limits of Subsection (a) shall apply to: (1) the actual perpetrators of physical violence, sexual abuse, or sexual exploitation and (2) any other adults who aided and abetted such violence, sexual abuse, or sexual exploitation.*

**EXPLANATION**

This amendment clarifies that the time limits (statute of limitations) for bringing a Complaint regarding physical violence, sexual abuse, or sexual exploitation against a person under 21 years of age does not apply to Complaints asserted against the actual perpetrators and any clergy who aided and abetted the conduct.

**22. A145: AMEND CANON IV.19.6 CLARIFYING CONSEQUENCES OF DEFAULT BY RESPONDENT**  
Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.19.6 be amended to read as follows:

Sec. 6. In any proceeding under this Title in which the Respondent fails to appear before the Conference Panel as required by Canon IV.12.4, ~~or to appear before the Hearing Panel as required by Canon IV.13.2(a), or to timely file with the Hearing Panel the written response required by Canon IV.13.2(c), such Panel shall deem as admitted by the Respondent and accept as true the allegations set forth in the written statement issued to the Respondent pursuant to Canons IV.12.3 or IV.13.2., and shall proceed in the absence of the Respondent without requiring proof of the allegations in the notice and written statement.~~ ~~may proceed in the absence of the Respondent and may accept as true the matters described in the notice issued to the Respondent pursuant to Canons IV.12.3 or IV.13.2~~

**EXPLANATION**

This amendment provides that a Respondent's failure to appear or respond as required results in deemed admissions of the allegations in the Complaint. This change seeks to encourage full participation by the Respondent and not to permit such tactics to disrupt the Title IV process.

**23. A146: AMEND CANON IV.19.14(B) AND (C) IMPARTIALITY**  
Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.19.14(b) and (c) be amended as follows:



(b) *The Church Attorney, Procedural Officer, or Any member of any panel provided for in this Title, shall disqualify himself or herself in any proceeding in which such person's impartiality may reasonably be questioned. The person shall also disqualify himself or herself when the person, the person's spouse, any person within the third degree of relationship to either of them or the spouse of such person, (1) is the respondent, complainant, or any injured person, (2) is likely to be a witness in the proceeding, (3) has a personal bias or prejudice concerning the respondent, complainant, or any injured person, (4) has personal knowledge of disputed evidentiary facts concerning the proceeding, (5) has a personal financial interest in the outcome of the proceeding or in the respondent, complainant, any injured person, or any other interests that could be substantially affected by the outcome or (6) is a member of the same congregation or otherwise has a close personal or professional relationship with the respondent, the complainant, any injured person, or any witness in the matter.*

(c) *The Church Attorney, Procedural Officer, or Any member of any panel provided for in this Title who has not disqualified himself or herself as provided in this section, may be subject to challenge by the Church Attorney or the Respondent on the grounds described in this section. The Complainant or the Complainant's advisor may inform the Church Attorney of such grounds. The challenge shall be investigated by the remaining members of the Panel who shall determine whether the challenged person should be disqualified and replaced according to the Procedures of this Title for filling vacancies.*

EXPLANATION

This amendment provides for the disqualification and removal of the Church Attorney and Procedural Officer.

**24. A147: AMEND CANON IV.19.25 CLARIFICATION OF BISHOPS PERFORMING AS BISHOP DIOCESAN**  
*Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.19.25 be amended to read as follows:*

Sec. 25. If there is neither a Bishop Diocesan nor a Bishop Coadjutor nor a Bishop Suffragan nor an Assistant Bishop expressly assigned the administration of clergy discipline in a Diocese and not under a restriction on ministry or Sentence of suspension, the Diocese shall, by agreement pursuant to Canon III.13.2, arrange for a Bishop to perform the duties of the Bishop Diocesan under this Title before commencing or continuing with any proceedings under this Title. *A Bishop performing the duties of the Bishop Diocesan under this Section has all the authority and powers of the Bishop Diocesan.*

EXPLANATION

This amendment clarifies the full authority of another bishop who performs the duties of the Bishop Diocesan under Title IV.

**25. A148: AMEND CANON IV.19.30 REQUIRING ELECTRONIC COPIES OF PROCEEDINGS**  
*Resolved, the House of \_\_\_\_\_ concurring, That Canon IV.19.30 be amended to read as follows:*

Sec. 30. Records of proceedings shall be preserved as follows:

(a)(1) Each Hearing Panel and Provincial Court of Review shall keep a complete and accurate record of its proceedings by any means from which a written transcript can be produced. When all proceedings have been concluded, the president of the Panel or Court shall certify the record. If the president did not

participate in the proceeding for any reason, the Panel or Court shall elect another member of the Panel or Court to certify the record.

(2) The Panel or Court shall make provision for the preservation and storage of a copy of the record of each proceeding in the Diocese in which the proceeding originated.

(3) The Panel or Court shall promptly deliver the original certified record of its proceedings to the Archives of The Episcopal Church.

(b) The Bishop Diocesan shall

(1) promptly deliver to the Archives of The Episcopal Church a copy of any Accord or Order which has become effective and a record of any action of remission or modification of any Order and

(2) provide for the permanent preservation of copies of all Accords and Orders by means which permit the identification and location of each such copy by the name of the Member of the Clergy who is the subject thereof.

(c) *When printed records are submitted under this Canon, there shall be delivered to the Archives of the Episcopal Church an electronic copy or version of the records required to be preserved under this Section in such format as The Archives of the Episcopal Church may specify.*

EXPLANATION

This amendment requires that an electronic copy of designated Title IV documents be submitted to The Archives, using an Archives-approved format.

I. A149: AMEND CANON V.4.1(A)

Resolved, the House of \_\_\_\_\_ concurring, That Canon V.4 be amended as follows:

Sec. 1 (a) Except where the Constitution or Canons of the General Convention provide to the contrary, the term of a member in any body of the General Convention consisting of several members shall become vacant as follows:

(1) upon absence from two regularly scheduled meetings of the body between successive regular meetings of the General Convention unless excused by the body;

(2) upon entry of an Order or Accord, which Order or Accord includes a Sentence of ~~Inhibition~~ Admonition, Suspension, or Deposition of a Member of the Clergy then serving on the body;

(3) upon the renunciation of the ministry of this Church by a Member of the Clergy;

(4) upon the certification to the Presiding Bishop by the Disciplinary Board for Bishops as to the abandonment of the Church by a Bishop pursuant to Canon IV.16;

(5) upon the certification by the Standing Committee as to the abandonment of the Church by a Priest or Deacon pursuant to Canon IV.16; or

(6) for cause deemed sufficient by a two-thirds vote of all the members of the body.

**EXPLANATION**

This amendment to Title V removes the pre-2009 reference to Title IV “inhibition” and uses updated 2009 language — e.g., Order and Accord.

**10. A150: DEVELOP TITLE IV TRAINING MATERIALS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention authorize the Standing Commission of Constitution and Canons to develop and implement Title IV training materials for use throughout the Church; and be it further

*Resolved*, That the General Convention request the Joint Standing Commission on Program, Budget, and Finance to consider a budget allocation of \$339,220 for the implementation of this resolution, such amount to be used for the development of such materials; and be it further

*Resolved*, That the General Convention request the Joint Standing Commission on Program, Budget, and Finance to consider a budget allocation of \$224,820 for the implementation of this resolution, such amount to be used for the translation of the Title IV training materials into Spanish and Creole.

**EXPLANATION**

Throughout the triennium, the Commission has engaged in a comprehensive study of the implementation of the rollout of the new Title IV. This study started with the Commission’s actively seeking feedback from throughout the Church. As a result of this request for feedback, the Commission has studied more than 100 Title IV issues, which will be reported on separately. Throughout this process, the Commission quickly and repeatedly discovered that a steady theme permeated its work — an acute and immediate need for comprehensive training.

Furthermore, the entire church-wide community has been imploring General Convention, Executive Council, and other church officers for years to provide training, guidance, and assistance in navigating Title IV. Dioceses and Provinces lack the resources and, in some cases, the knowledge and experiences to provide consistent and immediate training to all involved in the Title IV processes. Seminarians are not receiving adequate — or in some cases, any — education in Title IV. As a result, many Priests are wholly unaware of the standards to which they are being held and of the disciplinary process that governs them.

This budgetary request is presented in response to these needs.

The Commission proposes to develop training materials that include written materials, online training modules, and a Title IV Resource Team that would respond to inquiries and help individuals navigate Title IV. By adding the Resource Team in addition to the written materials and online training modules, the Commission is creating a reliable source of knowledgeable people to whom those with Title IV questions may go, thereby increasing consistency in the application of Title IV across the Church, and decreasing the pressure and reliance on those few Chancellors upon whom to date many have come to rely.

Once created, the training modules could provide Seminaries with reliable teaching tools that could easily be incorporated into existing curriculum at little or no cost to the institutions. The online modules will be easier and more cost-effective to update than traditional training, thereby allowing for more immediate training updates following changes to Title IV. The better the information that can be provided to all involved in the Title IV process, the more cost-effective the process can be for all involved. A single Title IV matter can cost Dioceses and clergy tens of thousands, if not hundreds of thousands, of dollars in litigation costs. Chancellors estimate that lack of training significantly increases the cost of litigation, by estimates by as high as 30-50 percent.

Further, a poorly handled Title IV matter can cause unnecessary — and often irreparable — harm to both relationships and reputations of all parties involved. The Church has a responsibility to remediate any unnecessary costs, both relational and financial. Consistent and quality upfront training can greatly assist in this regard.

More harm to the Church can flow from the mismanagement of a claim than from the misconduct itself. The training should be viewed as an investment in a savings plan rather than an unwanted cost.

# STANDING COMMISSION ON ECUMENICAL AND INTERRELIGIOUS RELATIONS

## Membership

The Rt. Rev. Philip Duncan, *Chair*, 2015  
The Very Rev. Sam Candler, *Vice Chair\**, 2015  
Ms. Elizabeth Ring, *Vice Chair*, 2018  
Mr. Matthew Hall, *Secretary*, 2015  
The Rt. Rev. C. Franklin Brookhart, 2018  
Mrs. Carrie Díaz-Littauer, 2018  
The Very Rev. Peter Eaton, 2015  
The Rev. T.J. Freeman, 2018  
The Rt. Rev. Scott Hayashi, 2018  
The Hon. Joanne O'Donnell, 2015  
The Rev. Steven Smith\*, 2015  
Mr. C. Edward Vance III, 2015  
The Rev. Canon Manoj Mathew Zacharia, 2018  
The Rev. Brian Cole, *Executive Council Liaison*  
The Rev. James Biegler, *Episcopal Diocesan Ecumenical and Religious Officers (EDEIO) Liaison*  
The Rev. Ernesto Medina,  
*President of the House of Deputies Representative*  
Mr. Richard Mammana, *Staff\**  
The Rev. Margaret Rose, *Staff*

### *Changes in Membership\**

Two changes in membership occurred throughout the triennium: Steven Smith replaced Sam Candler in August 2014, and Richard Mammana was added as a staff member in June 2014. Dean Candler served as vice chair prior to his departure and was succeeded in that role by Elizabeth Ring.

### *Representation at General Convention*

Bishop Philip Duncan and Deputy Carrie Díaz-Littauer are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** “To recommend to the General Convention a comprehensive and coordinated policy and strategy on relations between this Church and other Churches, and this Church and other religions, and to make recommendations to General Convention concerning inter-Church cooperation and unity, and interreligious dialogue and action” [Canon I.1.2(n)(5)]. The Commission also nominates for appointment by the Presiding Bishop persons to serve on the governing bodies of ecumenical and interreligious organizations to which this Church belongs and to receive reports from these bodies, which are then presented to the Presiding Bishop and Executive Council.

The Ecumenical and Interreligious Deputy is part of the Global Partnerships Team and works closely with the Office of the Presiding Bishop. The Office of Ecumenical and Interreligious Relations initiates and maintains ongoing work in ecumenical and interreligious relations, a record of which may be found on The Episcopal Church’s website.

## Meetings

- November 12-15, 2012, St. Louis, Missouri
- March 20, 2013, teleconference
- May 22, 2013, teleconference
- June 17, 2013, teleconference
- August 13, 2013, teleconference
- August 26, 2013, teleconference
- November 14, 2013, teleconference
- January 27-30, 2014, Salt Lake City, Utah
- July 11, 2014, teleconference

## Resolutions Referred by the 77th General Convention

### 2012-A035: COMMIT TO CONTINUED INTERRELIGIOUS ENGAGEMENT

The Commission charged the Episcopal Diocesan Ecumenical and Interreligious Officers (EDEIO) to promulgate the interreligious statement approved by the 76th General Convention and to gather information about interreligious practices happening within their respective dioceses. This was done beginning in November 2013 via a survey instrument in conjunction with Congregational Research personnel. A statistically significant number of dioceses responded, and the findings were as follows:

- More than half of all dioceses are engaged in some form of interfaith dialogue and/or ministry.
- Most of the interfaith dialogue and ministry is with Jews and Muslims.
- In many cases, the involvement with Jews and Muslims includes dialogue on topics of common interest, including religious matters, shared worship occasions, and participation in local and regional interfaith councils.

### 2012-A036: FURTHER DIALOGUE WITH ELCA

This resolution posed a challenge for the SCEIR, as it appeared to direct the Lutheran-Episcopal Coordinating Committee to act. This would seem to be beyond General Convention's authority, since the coordinating committee has both Episcopal and Lutheran members. Thus, the SCEIR spoke with The Rt. Rev. Alan Scarfe, Episcopal co-chair of the coordinating committee, to ask him to raise the issues listed in A036 with the LECC, which he did. While there is no specific resolution to present to the 77th General Convention to answer all points raised, dialogue along these fronts continues.

### 2012-A037: APPROVE AND COMMEND GUIDELINES FOR ECUMENICAL SHARED MINISTRIES

The Commission commended the guidelines on ecumenical shared ministries passed by the 76th General Convention to bishops for implementation as appropriate within their dioceses. As successes in joint work continue, there will likely be need of additional guidelines to address new and diverse circumstances.

### 2012-A076: STRENGTHEN SMALL CONGREGATIONS

The SCEIR committed itself to keeping small congregations, as well as congregations in a variety of differing contexts, in mind throughout its work. The Commission also notes and gives thanks that it is often within small congregations that some of the most creative and helpful ecumenical models continue to arise.

### 2012-B019: ISRAELI-PALESTINIAN PEACE AND SUPPORT OF THE DIOCESE OF JERUSALEM

At its opening meeting, the Commission discussed the interreligious aspects of the Israeli-Palestinian conflict, the relative benefits of divestment and positive investment, and the study document "Land of Promise?". Still, the primary thrust of this particular resolution fell under the aegis of the Standing

Commission on Anglican and International Peace with Justice Concerns, so SCEIR also conversed about how it might be able to coordinate efforts with that Commission. Additionally, as the resolution requested, the Presiding Bishop will lead an interfaith pilgrimage comprised of Episcopalians, Jews, and Muslims to the Diocese of Jerusalem in January 2015.

#### 2012-Do81: DIALOGUE WITH THE LDS CHURCH

The SCEIR met in January 2014 in Salt Lake City and was given the opportunity to receive generous hospitality from and have face-to-face conversations with members of the leadership of the Church of Jesus Christ of Latter-day Saints. This fruitful meeting helped to set the stage for the time that Episcopalians will share with LDS volunteers throughout General Convention 2015. Also, building on our time together, SCEIR has prepared educational resources about the LDS to assist General Convention attendees. Still, at this time, the SCEIR has no plan to recommend beginning formal bilateral dialogue with the LDS Church.

### **Status of Ongoing Dialogues and Full Communion Relationships**

#### METHODIST-EPISCOPAL DIALOGUE

Although early in the triennium there had been high hopes to have a United Methodist-Episcopal full communion agreement to present to General Convention 2015, such an agreement has not yet been reached. A task force has focused on drafting such an agreement to engage the fullest possible participation of the historic African-American Methodist churches. While further work is needed to achieve full communion, the interim Eucharistic sharing agreement adopted by General Convention in 2006, and the 2010 document “A Theological Foundation for Full Communion,” continue to provide direction toward full communion.

More recently, the book, *That They May Be One?: The Episcopal-United Methodist Dialogue* by dialogue co-chairs Frank Brookhart and Gregory Palmer have further contributed to the conversation. The SCEIR is hopeful that a full communion agreement will be ready to present to General Convention in 2018.

#### PRESBYTERIAN-EPISCOPAL DIALOGUE

Dialogue between The Episcopal Church and the Presbyterian Church (USA) has continued throughout the triennium. Discussions around expressions of ministry — the question of personal episcopate versus corporate episcopate in particular — have not yielded agreement, but have helped to clarify the differences between our two churches. Further conversations may move us toward some sort of bilateral agreement on the interchangeability of ministers, which would be useful to CUIC as it seeks out a multilateral interchangeability agreement. Nonetheless, it is important to recognize and celebrate the unique gifts that the PCUSA can continue to share with The Episcopal Church.

#### CHURCH OF SWEDEN-EPISCOPAL ENGAGEMENT

We give thanks for our many decades long partnership with the Church of Sweden. In recent years, that partnership has deepened with the sponsorship of a climate change seminar in 2013, with joint work with the Philippine Independent Church and the Old Catholic Union of Utrecht in a theological seminar on Globalism and Catholicity, and with conversations on mission-exchange possibilities. The two churches have participated in significant church life events, notably the recent installation of Archbishop Antje Jackelyn in June 2014. During the Triennium, theological background documents have been prepared as we continue and deepen our relations and full partnership.

#### OLD CATHOLIC CHURCHES OF THE UNION OF UTRECHT

The full communion relationship that The Episcopal Church shares with the Old Catholic Churches of the Union of Utrecht — our oldest such relationship — continues to thrive. The Rt. Rev. W. Michie Klusmeyer remains the representative of The Episcopal Church to the Old Catholic International Bishops’ Conference. Two sources of confusion remain on this front. First, there are concerns about overlapping jurisdictions, as

the Church of England, the Old Catholic Church, and The Episcopal Church all have congregations within the same geographic areas.

Second, the Polish National Catholic Church was removed from the Union of Utrecht in 2004, so there are presently no Old Catholic Churches in the United States. Given our long-standing, full-communion partnership, the Archbishop of Utrecht therefore acknowledges The Episcopal Church as the expression of Old Catholicism in the United States, and so there are no self-described “Old Catholic Churches” in the United States with whom The Episcopal Church is in communion.

### **Ongoing General Convention Mandates**

#### **CHURCHES UNITING IN CHRIST**

Along with eight fellow churches, The Episcopal Church remains an active member of Churches Uniting in Christ (CUIC), the successor to the Consultation on Church Union. This multilateral dialogue continues to work toward interchangeability of ministry among its members and to eliminate the scourge of racism as a barrier to unity.

#### **ANGLICAN-ROMAN CATHOLIC DIALOGUE IN THE UNITED STATES**

The Anglican-Roman Catholic dialogue in the United States concluded its most recent round during the past triennium. During its meeting on February 24-25, 2014, the dialogue approved the statement entitled, “Ecclesiology and Moral Discernment: Seeking a Unified Moral Witness,” which used immigration and same-sex relations as case studies.

The SCEIR is deeply grateful to The Rt. Rev. John Bauerschmidt of The Episcopal Church and to The Rt. Rev. Ronald Herzog of the Roman Catholic Church for serving as co-chairs of ARCUSA leading up to the release of this document. The Anglican-Roman Catholic International Commission also continued its third round during this triennium, meeting in Rio de Janeiro, Brazil from April 29, 2013 through May 7, 2013; and in Durban, South Africa from May 11, 2014 to May 20, 2014. This third round focuses on the Church as Communion, local and universal; and case studies will include labor, apartheid and slavery, and stem-cell research.

#### **INTERNATIONAL ANGLICAN-ORTHODOX THEOLOGICAL DIALOGUE**

The International Commission for Anglican-Orthodox Theological Dialogue met twice during the past triennium — September 4-11, 2013 in Serbia and September 17-24, 2014 in Jerusalem. Continuing its focus on Christian anthropology, the Commission addressed questions about topics including marriage and the beginning and end of life. The Episcopal Church continues to lack formal representation on this body since being asked to leave in 2010, but the SCEIR is eagerly looking forward to the time when we once again participate fully.

#### **PHILIPPINE INDEPENDENT CHURCH-EPISCOPAL CHURCH CONCORDAT COUNCIL**

Since 1961, the Philippine Independent Church (PIC), also known as the Iglesia Filipina Independiente (IFI), and The Episcopal Church have worked together under a concordat of full communion. Meetings during the current triennium have established common mission goals as well as theological dialogues. Ongoing conversation regarding the work of the IFI in the United States and partnerships in the Philippines, as well as participation of the Obispo Maximo in Episcopal Church meetings, continue to deepen the partnership.

#### **NATIONAL COUNCIL OF CHURCHES**

The National Council of Churches is an ecumenical body of 37 communions representing Protestant, Anglican, Orthodox, evangelical, historic African-American, and Living Peace churches. Its two current priorities are combating mass incarceration and the racial bias it carries, and working to foster interreligious peacemaking. The NCC also provides a vehicle by which The Episcopal Church engages in interreligious dialogue with Jewish and Muslim partners. Episcopalians have been deeply involved in the recent



restructuring of the National Council of Churches, particularly in the leadership of the Convening Tables and ongoing anti-racism work.

#### WORLD COUNCIL OF CHURCHES

The World Council of Churches is the most inclusive worldwide ecumenical body, composed of Orthodox, Anglican, and Protestant Churches from more than 110 countries. This triennium saw the WCC's 10th Assembly (governing body) take place from October 30, 2013 to November 8, 2013 in Busan, South Korea with the theme of "God of life, lead us to justice and peace." Daily prayer, Bible study, and fellowship marked the Assembly, which also addressed topics including the politicization of religion, rights of religious minorities, reunification of the Korean peninsula, and just peace.

#### CHURCH WORLD SERVICE

Church World Service is a cooperative ministry among Orthodox, mainline, and evangelical churches working together to address issues of hunger, poverty, and migration. The Episcopal Church partners with CWS, most particularly in its refugee-resettlement work; and supports local partnership efforts with CWS, notably in its CROP Walk to fight hunger.

#### CHRISTIAN CHURCHES TOGETHER IN THE USA

Christian Churches Together is the broadest ecumenical organization in the United States, with participants from the Roman Catholic, Anglican, Orthodox, mainline, evangelical, and Pentecostal branches of the Christian family. CCT has had three annual meetings this triennium focusing on immigration (2013), mass incarceration and its relationship to race (2014), and immigrant faith communities (2015).

#### LUTHERAN-EPISCOPAL COORDINATING COMMITTEE

The Lutheran-Episcopal coordinating committee has continued to work during the previous triennium to draft a response to "Called to Common Mission," the full-communion agreement between The Episcopal Church and the Evangelical Lutheran Church in America. General Convention resolution 2012-A036 correctly noted that there were still points of divergence, including the questions of lay presidency and the role of deacons in the Church, and the LECC has focused on these in its discussions. At this point, there is no specific resolution to put forward that would harmonize our two stances, but discussions continue.

The triennium has also yielded a new website listing a broad array of joint Lutheran-Episcopal congregations and an illuminating article from ELCA co-chair Mitzi Budde in the *Journal of Ecumenical Studies* entitled, "Are We There Yet?: The Task and Function of Full-Communion Coordinating Committees." Moving forward, the LECC will continue to focus on questions of synod/diocese partnerships at the judicatory level, theological education, youth and young adult ministry, campus ministry, advocacy, environmental policy, and a joint new bishops' school.

#### MORAVIAN-EPISCOPAL COORDINATING COMMITTEE

In its first triennium, the Moravian-Episcopal coordinating committee has begun work on a document providing guidelines for the orderly exchange of ministers between the two Churches. One sticking point that is still being worked out is that there is no provision in the full-communion agreement for the orderly exchange of deacons. Given that The Episcopal Church is in full communion with both the ELCA and the Moravian Church, and that they are in full communion with one another, we are working to ensure that exchanges among the three Churches are each in line with the others. The SCEIR gives particular thanks for this newest full-communion partner and continues to hold them in our prayers.

#### EPISCOPAL DIOCESAN ECUMENICAL AND INTERRELIGIOUS OFFICERS NETWORK

The Episcopal Diocesan Ecumenical and Interreligious Officers (EDEIO) network continues to be a great source of information and support for the SCEIR. We are deeply grateful for the work they do and are humbled by their ability to see God in our ecumenical and interreligious partners. This triennium, they have

been particular helpful in gathering information about interreligious practices requested by resolution 2012-A035. They have also served to represent The Episcopal Church at the National Workshop on Christian Unity in both 2013 and 2014.

#### INTERRELIGIOUS RELATIONS

Interreligious conversation and relationship remain key parts of the SCEIR's work. Much of this work is done through ecumenical bodies such as the National Council of Churches, which hosts both Christian-Jewish and Christian-Muslim dialogues. Additionally, Communion-wide bodies such as the Network for Interfaith Concerns continue to study Christian-Muslim relations on behalf of the Anglican Consultative Council, and to host such interreligious events as the Christian-Hindu conference it sponsored in October 2014. The interreligious statement endorsed by the 76th General Convention continues to serve as The Episcopal Church's starting point for these conversations, and this statement has been broadly disseminated and studied during the triennium. Beyond these formal dialogues, Episcopalians have also been strongly engaged with other interreligious organizations, such as Religions for Peace.

#### Goals and Objectives of Recommended Future Work

The SCEIR would like to see a formal statement noting our historic partnership with the Church of Sweden, and another ushering in full communion with the United Methodists. The Commission has indicated a need for greater transparency, accountability, and communication with regard to dialogues, coordinating committees, and ecumenical bodies, including public notice of representatives, meetings, and reports of accomplishments.

Finally, attention should be paid to the variety of ecumenical and interreligious work that is already being done on a local level, since these laboratories of relationship will help to spur larger, church-wide initiatives in this direction. Empowering local ecumenical and interreligious officers will greatly enhance this work.

#### PROPOSED RESOLUTIONS

##### A070: MAKE APPOINTMENTS TO DIALOGUES AND COORDINATING COMMITTEES

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Presiding Bishop and the President of the House of Deputies jointly to appoint representatives to official ecumenical dialogues and coordinating committees of full-communion partners.

##### EXPLANATION

At present, only the Office of the Presiding Bishop appoints representatives to serve on ecumenical dialogues. Because the various dialogues are authorized by action of the General Convention, the method used to appoint representatives should be consistent with the method used with all other appointments: joint appointment by both Presiding Officers.

##### A071: ALLOW TRANSFER OF CLERGY BETWEEN ANGLICAN PROVINCES

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Standing Commission on Constitution and Canons to present to the 79th General Convention appropriate changes to the Canons to allow clergy in good standing in The Episcopal Church to accept a call to another Province in the Anglican Communion in a manner consistent with Letters Dimissory.

##### EXPLANATION

The Episcopal Church welcomes clergy in good standing from other Provinces of the Anglican Communion who are called to ministry in The Episcopal Church through an established search and call process. Episcopal clergy in good standing are welcomed into other Provinces of the Anglican Communion when they are called to ministry in those Provinces through an established call process.

Recently, however, Episcopal clergy in good standing who accept calls into other Provinces of the Anglican Communion have been required to renounce their orders in The Episcopal Church. This is not a requirement that other Provinces in the Communion ask of their clergy in good standing. It penalizes our clergy in good standing and denies them the opportunity to accept calls into churches in other parts of the world and to return to ministry in The Episcopal Church. It also redefines our understanding of ordained ministry, since we claim to ordain deacons, priests, and bishops into the ministry of Christ's one, holy, catholic, and apostolic Church.

## Budget

In the 2013-2015 triennium, the Commission received a budget of \$16,000.00, of which \$9,559.48 was spent on the in-person meeting in Salt Lake City. Another \$779.15 was spent on Adobe Connect licensing fees, leaving a balance of \$5,661.37.

The SCEIR plans to meet approximately one time during the next triennium. This will require \$500.00 for 2016, \$10,000.00 for 2017, and \$500.00 for 2018, for a total of \$11,000.00 for the triennium.

# STANDING COMMISSION ON HEALTH

## Membership

The Rt. Rev. Marc Handley Andrus, *Chair*, 2018  
The Rev. Marshall Scott, *Vice Chair*, 2018  
The Rev. Stannard Baker, *Secretary*, 2018  
The Rt. Rev. David Álvarez, 2015  
Mr. Isaiah Brokenleg, 2015  
Mr. Adrian Cardenas, Sr., 2018  
Ms. Mary Margaret Davis, 2018  
Ms. Elizabeth Embler, 2018  
Ms. Mimi Grant, 2018  
The Rev. Harriet Kollin, 2015  
Dr. Molly O'Dell, 2018  
Dr. Salem Saloom, 2018  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Ms. Stephanie Cheney,  
*Executive Council Liaison*  
The Rev. Dr. Patricia Hanen,  
*Representative of the President of the House of Deputies*  
Ms. Jayce Hafner, *Staff*

## Summary of Work

**Mandate:** To identify and study national and international health care issues, practices, and policies and the Church's health care ministries; and to make recommendations to General Convention.

The direction for our subcommittee is in response to Resolution 2012-Do68, "Move Toward Full Inclusion of Persons with Developmental Disabilities," in which the 77th General Convention made the following commitment:

*Resolved*, the House of Deputies concurring, That the Church recognizes that all people are children of God, regardless of mental abilities; and be it further

*Resolved*, That those with developmental disabilities, including but not limited to persons with Asperger's syndrome, persons on the autism spectrum, persons with Down syndrome, and persons with ADHD, require different approaches to education and pastoral care; and be it further

*Resolved*, That the 77th General Convention create a Task Force to study what resources are currently available, and to create resources that can be used to help educators and clergy to tend to this population, and to foster the unique talents found in this population that should be embraced and encouraged.

### Meetings:

- Nov. 12-15, 2012
- Jan. 7, 2013, 12:00 pm-1:00 pm (teleconference)
- Feb. 4, 2013, 7:00 pm-8:30 pm (teleconference)
- Apr. 9, 2013, 7:00 pm-9:00 pm (teleconference)
- June 20, 2013, 3:00 pm-5:00 pm (teleconference)
- July 22, 2013, 3:00 pm-5:00 pm (teleconference)

The Standing Commission on Health initially organized into several subcommittees, and at the same time began planning for a face-to-face meeting with two other standing commissions of The Episcopal Church. The shared hope was that these three commissions could collaborate on a narrow set of shared policy priorities that were agreed upon early in the triennium. Unfortunately, the planned meeting was prevented from happening by directives that required the funding for each of the commissions to be allocated before the meeting could take place.

The three-commission meeting had been planned in an economical fashion, and the subsequent meetings of the Standing Commission on Health (all of which were held virtually via Adobe Connect) demonstrate that abundant funds would have been available for this initial meeting.

The Standing Commission on Health moved forward with its subcommittees, and excellent work was accomplished by those subcommittees. What follows is the report of one subcommittee that was most appropriate for full reporting in the record of work for the 2013-2015 triennium. I wish to thank the members of the Standing Commission on Health for the commitment, expertise, passion, and good humor they brought to bear on this important work.

While health care reform is arguably the most prominent accomplishment of President Obama's administration to date, and while each member of the Standing Commission on Health is passionately committed to a range of issues under the general heading of "health," it would yet be fair to say that it is unclear in the impending reorganization of The Episcopal Church if this Standing Commission should move forward into another triennium in its current form. The issues clustered under "health" remain of paramount importance, but the question of how our Church should best engage these issues seems an open one.

Specifically, building on the original impulse to coordinate the work of three standing commissions — including that on Health — and drawing from the Health commission's discussions about health in the broader context of the new United Nations goals for sustainability, it might be well to reimagine this subject within a more embracing frame.

### **Work on Resolution Do68 from TEC's 77th General Convention**

"How, as a Church, are we changed by inclusion? Let us proclaim that we are all enriched by inclusion — similar to the full inclusion of women as clergy in the life of the Church, and the full inclusion of people of color and of LGBT people."

*[From a Diocese of Vermont focus group participant]*

At the meeting of the Standing Commission on Health held in St. Louis in November of 2012, a small subcommittee was formed to respond to Resolution Do68. While grant funds were sought for the work of this Subcommittee, none were forthcoming. Work went forward nonetheless. Following the advice of the full SCoH to survey The Episcopal Church and talk with people in dioceses and parishes, forums were held in the Diocese of Vermont and the Diocese of Los Angeles in the fall of 2013 and were attended by families of people with Developmental Disabilities (DD), people with DD, and by those with interest in or passion for this topic.

The questions asked at the forums were:

- 1) What has worked for you or your family in your parish, diocese, or in church-related activities?
- 2) What has not worked, what are the gaps, or what needs to be improved?
- 3) What is your vision of a more inclusive future for your parish, the diocese, or the larger Church?

These forums were informative and moving, as participants told stories of grace-filled moments of inclusion and shared painful memories of exclusion from church activities. Participants were unified in proclaiming the

need for a culture of inclusion in TEC; for training for clergy, lay leaders, and church school teachers; for access to resources; and for flexible liturgy options.

These forums were followed by a church-wide survey in late summer 2014 that was sent, in English and Spanish, to all bishops and General Convention deputies. Questions included in the church-wide survey were informed by, or arose from, the forum discussions.

While there was some criticism of some of the survey questions that asked respondents to quantify numbers of people with DD, 762 people responded to the survey with valuable suggestions about formation curriculum, adaptations to liturgy, and ways to develop a culture of inclusion in our Church. It became clear that survey questions asking for people to identify numbers of people in their parishes or dioceses with Autism Spectrum Disorder (ASD), Attention Deficit Hyperactivity Disorder (ADHD), or Intellectual Disabilities (ID) were difficult or impossible for bishops or clergy and lay leaders from large churches to answer, since a more direct knowledge of particular members of each congregation is necessary for this. Nonetheless, our Church has significantly large numbers of members with these disabilities, including children, teens, adults, and some of our clergy and lay leaders.

Without doubt, access to resources for formation at all levels, to ideas for creating a culture of inclusion, and to designs for liturgical flexibility options or adaptations are very much needed. In their narrative responses, many testified to the richness that comes from the inclusion of people with Developmental Disabilities. (For more details on response to the survey, please see the Appendix: Summary of Responses to Survey on Inclusion of People with Developmental Disabilities.)

### **Future Work in This Area; Resolution**

A representative from the Standing Commission on Lifelong Christian Formation and Education (SCLCFE) has recently been in touch with our Subcommittee to inform us that they are drafting a resolution for General Convention 2015 recommending that resources be made available for the full inclusion of people with DD.

Our findings on curricula and resources have been relayed to the SCLCFE. Its resolution is a much-needed and logical extension of our work. It is hoped that the Commission can receive some modest funds not necessarily to create new materials, but to disseminate them, and to educate clergy and lay leaders about current available information and resources for formation and worship.

In our view, it would be extremely helpful if, in the course of their work, a brief handbook were to be prepared outlining worship and formation options and ideas for clergy, lay leaders, and congregations. As our view is informed by professional practice in this area, we recommend that the SCLCFE receive approximately \$15,000 for this work.

The Standing Commission on Health, on the other hand, will not extend into the next triennium, and as such, will not be asking for a budget.

## **Budget**

Following is a breakdown of the expenses for the Standing Commission on Health during the 2013-2015 triennium:

Original budget: \$17,000

2013 Expenses: \$425 Adobe Connect Licensing Fee (for teleconferencing)

2014 Expenses: \$425 Adobe Connect License for 2014 (for teleconferencing)

No budget is requested for 2016-2018 triennium.

**APPENDIX: Summary of Responses to Survey on Inclusion of People with Developmental Disabilities**

[Extracted from the Survey on Inclusion of People with Developmental Disabilities, compiled by The Rev. Stannard Baker, creator of the survey and Co-chair with Mimi Grant of the Subcommittee on Full Inclusion, with approval and oversight by The Rt. Rev. Marc Andrus, Chair of the Standing Commission on Health.]

“We have a sense of radical welcome about this and the neighborhood we inhabit.”  
*[From the narrative portion of the survey – Question 11]*

**Introduction**

1. Surveys were sent to all General Convention deputies: lay and clergy from the House of deputies and all bishops from the House of Bishops. Some of those to whom the survey was sent delegated response to others in their dioceses or sent it to others in addition.
2. Responses were received in English and Spanish from 762 people.
3. The three developmental disabilities surveyed were as directed in Resolution D068.
4. It was difficult for bishops and clergy or deputies from large churches or dioceses to answer questions 5,6, and 7. However, many parish clergy and lay leaders felt that they could answer these questions reliably, and the responses to these questions demonstrate that substantial numbers of those in our congregations are people with developmental disabilities. **However, please note that these are not reliable numbers as they are “best guesses,” and some felt they could not respond because they are understandably not aware of parish- or church-school-level detail.**
5. Some respondents were leery of identifying people with developmental disabilities because they felt that they were being asked to provide diagnoses even though they were not skilled diagnosticians. The intent of the survey was for people to give information they already had from individuals and parents, and not to provide diagnostic information from unknown parishioners.
6. In the end, we were gratified by the large number of people who did fill out the survey, and we found the data provided and the narrative comments very helpful.

**Question 1: Diocese**

Responses came from all almost all dioceses.

**Question 2: Order of Ministry**

Lay = 53.5 percent  
 Priest = 40.4 percent  
 Deacon = 3.2 percent  
 Bishop = 2.9 percent

**Question 3: Is someone in your family a person with one of the below?**

Autism Spectrum Disorder (ASD): 106  
 Intellectual Disabilities (ID): 99  
 Attention Deficit Hyperactivity Disorder (ADHD): 176  
 None of the above: 429

**Question 4: Are these persons (select all that apply):**

Adult: 203  
 Teen: 73  
 Child: 82  
 Yourself: 25  
 Not applicable: 416

**Question 5: How many adults in your parish have one of the above?**

ASD: (492 responses); 10,604 individuals estimated, 21.55 percent  
 ID: (518 responses); 10,906 individuals, 21.05 percent  
 ADHD: (466 responses); 11,080 individuals, 23.78 percent

**Question 6: How many teens in your parish have one of the above?**

ASD: (491 responses); 10,444 individuals estimated, 21.27 percent  
 ID: (473 responses); 10,329 individuals, 21.84 percent  
 ADHD: (483 responses); 10,745 individuals, 22.25 percent

**Question 7: How many children in your parish have one of the above?**

ASD: (494 responses); 10,526 individuals estimated, 21.31 percent  
 ID: (470 responses); 10,315 individuals, 21.95 percent  
 ADHD: (486 responses); 10,941 individuals, 22.51 percent

**Question 8: What has worked best for you or your family in your parish-, diocesan-, or church-related activities?**

Top three responses:

1. 506 (69.8 percent): Church community is open and welcoming to people with developmental disabilities for worship, formation, and activities
2. 395 (54.5 percent): Inclusion of youth as acolytes
3. 353 (48.7 percent): Understanding that full inclusion of people with developmental disabilities is part of our radical welcome as a faith community

**Question 9: What has not worked? What are the gaps, or what needs to be improved?**

Top three responses:

1. 397 (54.8 percent): Lack of information/education
2. 111 (15.3 percent): Worship and church activities are not friendly to people with Developmental Disabilities and their families
3. 104 (14.3 percent): No attempt made to include people with developmental disabilities

**Question 10: What is your vision of a more inclusive future for your parish, the diocese, or the larger Church?**

Top five responses (percentages are much closer together on this question):

1. 446 (61.5 percent): Lead by example — have people who will act as mentors or leaders in inclusion
2. 398 (54.9 percent): Create experiences as well as resources
3. 377 (52.0 percent): Proclaim that we are all enriched by inclusion
4. 274 (37.8 percent): Study and converse about how our Church culture needs to change
5. 270 (37.2%): Make more specialized resources available

**A brief summary of narrative responses to questions 11 & 12:**

**Question 11: Do you have specific recommendations for Sunday school or adult education curriculum?**

1. By far, the most numerous themes related to:



- a. The need for inclusion or integration in formation and worship through:
  - i. Adaptation and flexibility in worship
  - ii. Use of “buddies” or adult partners
  - iii. Occasional special worship services, but also inclusion in ongoing worship
2. The need for training and resources for formation and faith leaders
3. Curriculum resources most often mentioned are specifically intended for those with special learning needs, or are adaptable and flexible and take into account the need for sensory experiences, movement, a variety of media and modalities, and active and interactive moments. (It was noted that adaptations made to formation and liturgy materials usually benefit everyone.)
  - a. Scanlan & Snyder, *Rhythms of Grace: Worship and Faith Formation for Children and Families with Special Needs*
    - i. Complete lessons for church school created with special needs in mind
  - b. *Catechesis of the Good Shepherd*, from The National Association of the Catechesis of the Good Shepherd
    - i. <http://www.cgsusa.org>
    - ii. An interactive approach to worship and formation that involves children, families, and others in Eucharist adapted, and that was created for those with special needs
  - c. *Godly Play*
    - i. <http://www.godlyplayfoundation.org>
    - ii. The hands-on quality of this church-school curriculum makes it easily adaptable for those with special needs
  - d. *Confirm not Conform: A Confirmation Program that Celebrates Questions and Choices*
    - i. <http://www.confirmnotconform.com>
    - ii. This confirmation curriculum has specific suggestions for those on the Autism spectrum that are also helpful for those with ADHD. It is also quite easily adaptable.
  - e. *J2A (Journey to Adulthood from Leader Resources)*
    - i. [http://leaderresources.org/j2a\\_youth](http://leaderresources.org/j2a_youth)
    - ii. Can also be adapted
  - f. *Lectio Divina*
    - i. Can work well with adults with special needs
4. Also mentioned:
  - a. **Forma:** an association and dynamic community of Christian educators, formation professionals, and their institutional partners that celebrates and upholds the diverse ministries of Christian formation across The Episcopal Church. With members from more than 40 states and 60 dioceses, Forma is an independent, nonprofit 501(c)(3) organization that is linked to, but not legally affiliated with, TEC.
    - i. <http://episcoforma.org>
  - b. *Rotation Sunday School*
    - i. <http://www.rotation.org>
  - c. Videos from Christ Church, Budd Lakes, NJ
    - i. Excellent footage of an interactive worship service and church school beautifully created for those with special needs. These are “unified” experiences that include everyone — those with special needs and others participating together.
    - ii. <http://www.christchurchbuddlake.org/category/videos>
  - d. *Buelah Land:* Flannel board story telling
  - e. *Curriculum for Disability and Faith*
    - i. Faith Alive Resources/Disability Ministry
  - f. Friendship Ministries
    - i. <http://www.friendship.org>  
Focused on including those with intellectual disability in Christian communities
  - g. *Praying with the Body from Paraclete Press*

- i. A way to use physical movement and to involve the whole body in prayer
- 5. Books:
  - a. *Child-by-Child: Supporting Children with Learning Differences and Their Families* by Susan Richardson (Moorehouse)
    - i. How-to, with theological grounding with integrated programs and activities, including worship
  - b. *The Special Needs Acceptance Book* by Ellen Sabin
  - c. *The Autism Acceptance Book* by Ellen Sabin
  - d. *Young Children and Worship & Journey to Adulthood* by Sonia Stewart

**Question 12: Do you have ideas or tips for inclusion in liturgy of people with Autism Spectrum Disorder, Intellectual Disability, or Attention-Deficit Hyperactivity Disorder?**

“Include, include, include! Invite people to vest and serve on the altar as acolyte, crucifer, etc. Listen and pray. Practice, patience: It’s a holy time and place — it will be OK.”  
 [Quotation from the narrative portion of the survey – Question 12]

- 1. The most numerous themes in response to this question were:
  - a. Use of lay participants encouraged
    - i. Individual coaching before a role is performed
    - ii. Use of buddies, shadowing
  - b. Benefit of inclusion in liturgy
    - i. Hold an instructional liturgy
    - ii. Clear structure, with flexibility, increase hands-on
  - c. Practicing radical welcome to all
  - d. Rector’s attitude
  - e. Environmental adaptations
    - i. Flexibility and movement in services
    - ii. Awareness of sensory environment
    - iii. Shorter and more flexible
    - iv. Include opportunities for movement (use of American Sign Language for the Sanctus or Lord’s Prayer)
    - v. List of duties required of them helpful to children with ASD (and to others) — have something visual
    - vi. Include something for everyone to read in the Bulletin
  - f. Holding special services: Joy Mass (see below), Rhythms of Grace, Catechism of the Good Shepherd
    - i. Most responders felt that these should be offered regularly but that all should be welcome in every service
    - ii. There was some worry about special services becoming exclusionary
- 2. Resources:
  - a. Video of Joy Mass at Trinity Episcopal Church, Seymour, CT
    - i. <http://www.trinityseymour.ctdiocese.org> — find “videos” on the drop down menu
      - 1. A Joy Mass takes about 25 minutes
  - b. Tony Briggie at St. Michael’s in Dallas is an expert on formation of youth acolytes with disabilities
- 3. Books and websites:
  - a. *Including People with Disabilities in Faith Communities* by Eric Carter
  - b. Books by Cathy Hooperman for use in formation:
    - i. *All Cats Have Asperger’s Syndrome*
    - ii. *All Dogs Have ADHD*
    - iii. *Inside Asperger’s Looking Out*
  - c. *Building Faith* articles at: <http://www.buildfaith.org>

- i. Christian formation inspiration from the Center for the Ministry of Teaching at Virginia Theological Seminary
- ii. Available at this website: Sharon Ely Pierson: Youth Curriculum Charts, VTS
  - 1. <http://www.buildfaith.org/2014/11/05/curriculum-charts-for-youth-and-adults/>
- d. Disabilities and Faith website:
  - i. <http://www.disabilitiesandfaith.org/resource>
    - 1. Training faith-based organizations in how to be more welcoming and accessible

# STANDING COMMISSION ON LIFELONG CHRISTIAN FORMATION AND EDUCATION

## Membership

Ms. Janie Stevens, *Chair\**, 2015  
Canon Thomas G. O'Brien III, *Vice Chair*, 2018  
The Rev. Moki Hino, *Secretary*, 2015  
Ms. Laurie Bailey, 2015  
The Rev. Evan D. Garner, 2018  
Ms. Andrea McKellar, 2015  
Ms. Kathryn Nishibayashi, 2018  
The Rt. Rev. John Rabb, 2015  
Ms. Carly Rowe, 2018  
The Rev. Helen Svoboda-Barber, 2015  
The Rt. Rev. Morris K. Thompson, 2018  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Ms. Ruth Frey, *President of the House of Deputies Liaison*  
Ms. Deborah Stokes, *Executive Council Liaison*  
Ms. Bronwyn Clark Skov, *Staff*

\*Janie Stevens passed away to her eternal reward on September 22, 2014.

### *Changes in Membership*

There were three changes to the Commission's membership during the triennium. Mr. Trey Yarborough was replaced by Ms. Andrea McKellar; Ms. Lydia Bucklin was replaced by Ms. Carly Rowe; and The Rev. Robyn Barnes was replaced by The Rev. Helen Svoboda-Barber.

### *Representation at General Convention*

Bishop John Rabb and Canon Thomas G. O'Brien III, Vice Chair, are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To review formation needs throughout The Episcopal Church and to develop and recommend to the General Convention comprehensive and coordinated policies for children, youth, young adults, adults, and seniors for Lifelong Christian Formation.

Our "work" is to become aware of situations and opportunities that relate to Christian and Formation and Education, to obtain information regarding actions and programs conducted by others in these areas, to evaluate the information obtained, and to make reasoned and feasible recommendations to General Convention about policies to be implemented and actions to be taken by others to improve Christian Formation and Education in The Episcopal Church.

### **The Work of the Commission and the Five Marks of Mission**

The Five Marks of Mission and the need to assist small congregations have informed and guided the work of the Commission during the Triennium.

All of the initiatives of the Commission are related to the Second Mark of Mission to “teach and nurture.” In addition, all of our initiatives support the other Marks of Mission in assisting others to implement those Marks actively in their lives and ministries as they impact their education and formation needs.

We believe that for The Episcopal Church to live into its best future, the Five Marks of Mission will be both the verbal expression and the undergirding basis for all activities of the Church and its dioceses, congregations, and members. The Five Marks of Mission incorporate and subsume the Episcopal Baptismal Covenant, the Charter for Lifelong Christian Formation, the Children's Charter, and the Millennium Development Goals — each of which articulates specific aspects of living into the Five Marks of Mission so that The Episcopal Church and its members will grow more vibrant and loving in bringing the Gospel message to all.

If The Episcopal Church is to live into its best future, it will provide platforms and environments that enable persons to use their giftedness for the betterment of the Church and the world. The Five Marks of Mission are what The Episcopal Church is supposed to look like when it is doing its work.

Christian Formation — the making of disciples — is central to the implementation of **all** of the Five Marks of Mission. Formation is not just education — it is **all** of those activities that “form” us as Christians and, in particular, as Episcopalians. Formation empowers and enables each of us to have the resources to live out the Five Marks of Mission in our own circumstances, contexts, and ministries. Each of us needs to know the “story” of being an Episcopalian and to have it inculcated into our lives if we are to present ourselves and The Episcopal Church to others in a believable way. This is particularly true for young adults and for youth. Formation is central to knowing (and living out) the “story” and what it means to be an Episcopalian in the 21st century.

In the work of the Commission, we have been especially mindful that small congregations often lack significant resources for Christian Formation and Education. Much of our energy has been directed at developing ways in which small congregations and their Christian Formation ministers can gain access to materials and resources that will make their efforts more fruitful.

### **Meetings**

The Commission met in person in St. Louis, Missouri November 13-15, 2012; and in Linthicum Heights, Maryland October 21-24, 2014. The Commission also held six two-hour meetings via Adobe Connect. These electronic meetings were held February 5, 2013; April 30, 2013; July 17, 2013; November 12, 2013; February 4, 2014; and May 20, 2014.

At each Adobe Connect meeting, the Commission received oral reports from the chairs and members of the subcommittees that were established to develop information regarding each of the areas of concentration.

At its July 17, 2013 meeting, the Commission developed extensive responses to the Budget Visioning Questions posed to CCABs by the Finances for Mission Committee of Executive Council.

At its October 2014 in-person meeting, the Commission reviewed and revised a draft of this *Blue Book* report.

At each meeting, reports were received from the Commission’s Staff Liaison and its Executive Council Liaison, as well as from a variety of networks that are involved in the ministry of formation and education. These included Forma and Episcopal Camps and Conference Centers.

The Commission was represented by its members at a number of gatherings of Christian Formation leaders, such as at Forma’s Annual Conferences in 2013 and 2014; at the Christian Formation Conference at Kanuga in 2013 and 2014; and at the Western Christian Educators (renamed PNEUMA) Conference in 2013.

Members of the Commission also served as liaison to other commissions and reported to SCLCFE on the activities of other commissions.

### **Areas of Concentration**

At the initial meeting in November 2012 in St. Louis, Missouri, the Commission reviewed resolutions passed at the 77th General Convention relating to the work of the Commission. The resolutions referred to the Commission by the General Convention Office were: A076 (Small Congregations) and A128 (Doctrine of Discovery).

The Commission was prepared to work with the Executive Council Committee on Indigenous Ministries as well as with the three entities that were directed to consult with the Commission in Resolution A128 regarding the Doctrine of Discovery. The Commission continues to stand ready to assist in this work.

In addition, the Commission determined that the following resolutions from General Convention 2012 might be applicable to its work:

- A046: Commend Continuing Development of Lifelong Christian Formation
- A047: Online Resource Center
- A067: Theological Education Ministry (referred to the SC on Ministry Development)
- A125: Recommitting to the Work of Anti-Racism
- D068: Address Education and Pastoral Care of Developmentally Disabled

The Commission, in response to Resolution A076 and other resolutions, decided to concentrate only on the following areas during the triennium:

1. Awareness in The Episcopal Church of the Five Marks of Mission
2. Updating the 2004 Model Policies for the Protection of Children and Youth from Abuse (the “2004 Model Policies”)
3. Updating or supplementing the written and web-based *Safeguarding God’s Children* and the *Safeguarding God’s People* materials, and revising or supplementing other materials used to implement the 2004 Model Policies and to protect other persons against similar abuses
4. Confirming that dioceses and their congregations have adopted the 2004 Model Policies and are conducting training to prevent the abuse of God’s people by persons in positions of authority (including volunteers)
5. Awareness of electronic resources for Christian Formation
6. Use of certification programs for persons engaged in Christian Formation and Education
7. Dissemination of formation resources for persons with special needs

### **PROPOSED RESOLUTIONS**

A072: DEVELOP AWARENESS OF THE FIVE MARKS OF MISSION

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirm that the Five Marks of Mission adopted by the 76th General Convention in Resolution D027 are central to the work of the Church, its dioceses, its congregations, and the formation of its members; and be it further

*Resolved*, That the 78th General Convention direct that educational materials for instructing Episcopalians about the Five Marks of Mission (including separate curricula for children, youth, young adults, and adults) be developed, publicized, and disseminated; and be it further

*Resolved*, That in addition to printed versions of educational materials and curricula for the Five Marks of Mission, online versions of the educational materials and curricula be made available on The Episcopal Church website and on other Electronic Resource Centers (such as those maintained by Forma, Anglicans Online, the Center for Spiritual Resources, and others); and be it further

*Resolved*, That the Episcopal Church Center publicize the availability of educational materials and curricula for the Five Marks of Mission to dioceses and congregations; and be it further

*Resolved*, That the 78th General Convention direct dioceses and congregations to use materials that instruct persons about the Five Marks of Mission, such as Marked for Mission (for youth and young adults); and be it further

*Resolved*, That dioceses and congregations adopt the practice of intentionally and publicly stating how each of their activities relates to the Five Marks of Mission.

**EXPLANATION**

For the Five Marks of Mission to become truly central to the life of The Episcopal Church and its members, the Church needs to educate itself at all levels (congregations, dioceses, camps, and seminaries) about the Five Marks of Mission. This means that excellent teaching resources should be developed for all levels — for children, youth, young adults, and adults. These resources need to be made available and publicized on The Episcopal Church website and in other appropriate ways so that all Episcopalians and others will be aware of the Five Marks and The Episcopal Church’s commitment to them.

To emphasize and inculcate this centrality, dioceses and congregations should adopt the practice of stating how each of their activities relates to the Five Marks. For example, each action undertaken by a vestry or diocese should be directly related to one or more of the Five Marks, and this relationship should be understood by the persons taking the action. By consistently relating actions to one or more of the Five Marks, Episcopalians will become more aware of the Five Marks of Mission and their importance in the life of the Church.

**A073: UPDATE MODEL POLICIES FOR PREVENTING SEXUAL MISCONDUCT**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct that the 2004 Model Policies developed by The Church Insurance Agency Corporation for the Protection of Children and Youth from Abuse (the “2004 Model Policies”) be updated and supplemented to reflect the experience of the Church in using the 2004 Model Policies and to cover topics such as social media, mission trips, pilgrimages, camp and conference center programs, and other overnight events; and be it further

*Resolved*, That the Presiding Bishop and the President of the House of Deputies, not later than September 30, 2015, jointly appoint a Special Task Group of five to seven persons with experience in the use and development of Model Policies for Preventing Sexual Misconduct to update, or to oversee the updating of, the 2004 Model Policies; and be it further

*Resolved*, That the updating and supplementing of the 2004 Model Policies be completed by March 31, 2016; and be it further

*Resolved*, That the Updated Model Policies for the Protection of Children and Youth from Abuse to the Church (the “Updated Model Policies”) be promulgated after they are approved by the Special Task Group; and be it further

*Resolved*, That the Episcopal Church Center appoint a knowledgeable person to serve as a point of contact for dioceses to obtain information about complying with the 2004 Model Policies and the Updated Model Policies; and be it further

*Resolved*, That not later than December 31, 2016, the Guidelines for the Protection of Children and Youth of each diocese conform to the Updated Model Policies with due regard to applicable local laws on the subject matters of the Updated Model Policies; and be it further

*Resolved*, That all dioceses annually confirm, in writing or by email, to a designated office in the Episcopal Church Center, that the Guidelines of the diocese conform to the Updated Model Policies.

#### EXPLANATION

In the years since the 2004 Model Policies for the Protection of Children and Youth from Abuse were issued, there have been many new developments in both communications and ministry. The continued use of outdated policies may well be dangerous to God’s people and to The Episcopal Church and its dioceses and congregations. The 2004 Model Policies may be found on the web at <https://www.cpg.org/linkservid/3F743B4C-06F1-5DFF-86FFB64C8B79DE07/showMeta/0/?label=Model%20Policies%3A%20Preventing%20Children%20and%20Youth%20from%20Abuse>

Accordingly, the Commission urges General Convention to require updating of the 2004 Model Policies to reflect the experience of the Church in using the 2004 Model Policies and to cover such matters as social media, mission trips, pilgrimages, camp and conference center programs, and other overnight events. This updating work would be overseen by a Special Task Group, and the work of the Special Task Group should be completed by March 31, 2016.

A knowledgeable person should be appointed to serve as a contact person for dioceses to consult regarding the 2004 Model Policies and the Updated Model Policies.

In addition, we urge General Convention to require all dioceses to confirm to the Episcopal Church Center in writing that the diocese has adopted Guidelines for the Protection of God’s People that conform to the Updated Model Policies. We do not urge that dioceses be required to report on the content of their Guidelines or on how they are implementing them, but merely that dioceses have guidelines are in place.

#### A074: UPDATE THE SAFEGUARDING MATERIALS

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct that the Episcopal Church Center arrange for the updating or supplementing of written and web-based materials used in the Safeguarding God’s Children and the Safeguarding God’s People programs to reflect the experience of the Church in using the Safeguarding God’s Children and the Safeguarding God’s People materials; and to cover



topics such as social media, mission trips, pilgrimages, camp and conference center programs, and other overnight events; and be it further

*Resolved*, That, in addition to developing printed and web-based versions of the updated or supplemented Safeguarding God's Children and the Safeguarding God's People materials, electronic links to the online versions of the Safeguarding God's Children and the Safeguarding God's People curricula be made available on The Episcopal Church website; and be it further

*Resolved*, That the Episcopal Church Center publicize the availability of the revised or supplemented written and web-based Safeguarding God's Children and the Safeguarding God's People materials to dioceses and congregations; and be it further

*Resolved*, That dioceses of The Episcopal Church be required annually to confirm, in writing or by email, to a designated office in the Episcopal Church Center that the diocese and (to the best of its knowledge after due inquiry) congregations in the diocese are training persons in positions of authority (including clergy, staff, vestry, children, and youth educators/leaders and other volunteers) by using the Safeguarding God's Children and the Safeguarding God's People materials or other appropriate materials for this training; and be it further

*Resolved*, That after the written and web-based Safeguarding God's Children and the Safeguarding God's People curricula are revised or supplemented, re-training of trainers be conducted so that the persons conducting training in congregations and dioceses are fully aware of the changes in the training materials and are able to teach them competently; and be it further

*Resolved*, That the 78th General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$50,000 for the implementation of this resolution.

EXPLANATION

The *Safeguarding God's Children* and the *Safeguarding God's People* materials were prepared more than 10 years ago. Since then, there have been many new developments in both communications and ministry. The continued use of outdated policies and practices may well be dangerous to God's people and to The Episcopal Church.

Accordingly, the Commission urges General Convention to require updating or supplementing the written and web-based *Safeguarding God's Children*, such as those at [www.safeguardingonline.org](http://www.safeguardingonline.org) (password required) and the *Safeguarding God's People* materials to reflect the experience of the Church, and its dioceses and congregations, in using these materials; and to cover such matters as social media, mission trips, pilgrimages, camp and conference center programs, and other overnight events. This updating work may well be outsourced to the Church Insurance Agency Corporation (an affiliate of Church Pension Group) and should be performed under the overall supervision of appropriate staff at the Episcopal Church Center.

Some of this updating and supplemental work has been done by dioceses. The program of the Diocese of California may be found at <http://www.diocal.org/safechurch>. Its Social Media Guidelines are at [http://www.diocal.org/sites/default/files/media/PDF%20Docs/c2rr\\_social\\_networking\\_guidelines.pdf](http://www.diocal.org/sites/default/files/media/PDF%20Docs/c2rr_social_networking_guidelines.pdf)

The Episcopal Church in Connecticut has Guidelines for the use of Social Media at <https://www.episcopalct.org/Find-Resources/General-Parish-Operations/Safe-Church-Resources/Guidelines-for-Social-Media/>

The Diocese of Texas Safeguarding Policy on Social Media may be found at <http://www.epicenter.org/safeguarding-policies>

These three policies give those revising or supplementing the *Safeguarding God's People* materials and the other materials a “running start” in their updating and supplementing efforts.

In addition, we urge General Convention to require all dioceses to confirm to the Episcopal Church Center that the dioceses and their congregations are implementing the *Safeguarding God's Children* and the *Safeguarding God's People* programs or other comparable programs to protect children, youth, and others from abuse from persons in positions of authority. We do not urge that dioceses be required to report on how they are implementing the *Safeguarding God's Children* and the *Safeguarding God's People* (or similar) programs, but merely that they are implementing them.

We consider these recommendations a very high priority both to prevent harm to any of God's people and to reduce the potential for legal and other claims against The Episcopal Church, dioceses, and congregations for failing to take appropriate steps to protect others. Funds allocated for this updating and training work are an investment against harm to God's people and potential claims against The Episcopal Church and its dioceses and congregations.

**A075: DEVELOP AWARENESS OF ONLINE CHRISTIAN FORMATION RESOURCES**

Resolved, the House of \_\_\_\_\_ concurring, That the Episcopal Church Center establish a prominent tab or link on the website of The Episcopal Church to give persons seeking Christian Formation resources access to websites that provide suitable Christian Formation resources, including the websites maintained by Forma, the Center for Spiritual Resources of the Diocese of Western North Carolina, Anglicans Online, and the Center for the Ministry of Teaching at Virginia Theological Seminary; and be it further

Resolved, That the Episcopal Church Center publicize to dioceses, congregations, and Christian Formation leaders the availability of these websites that provide helpful Christian Formation resources, and be it further

Resolved, That dioceses and congregations with websites consider including links to websites that provide suitable Christian Formation resources; and be it further

Resolved, That Christian Formation leaders throughout The Episcopal Church be encouraged to share with these websites suitable formation resources that they themselves have developed.

**EXPLANATION**

There are a number of electronic resource hubs that provide easy online access to, and a workable index of, resources for Christian Formation. This resolution urges The Episcopal Church to make the existence and content of resource hubs more widely known and available to Episcopalians at all levels. The resource hubs are especially helpful to small congregations.

Some of the currently available electronic resource hubs are maintained by Forma (<http://episcoforma.org/resource-area> and <http://www.faithformationlearningexchange.net>), by the Center for Spiritual Resources of the Diocese of Western North Carolina (<http://thecsr.org>), by Anglicans Online (<http://anglicansonline.org/>)

resources/ce.html), and by the Center for the Ministry of Teaching at Virginia Theological Seminary (<http://www.vts.edu/cmt?rc=0>).

The Episcopal Church can be a “connector” to help coordinate access to the resources that exist both inside and outside the Church today by creating a prominent tab or a link on its website (<http://www.episcopalchurch.org>) to serve as a portal for any church or individual seeking materials to support ministry in the area of Christian Formation.

The Church Center should also make congregations and Christian Formation ministers aware of the electronic resource hubs. Most dioceses and congregations do not have a staff member to search for program ideas and resources from the greater Episcopal community in the area of Faith Formation. The internet greatly reduces that isolation, but it takes a trained eye and an Episcopal ethos to analyze the vast amount of content that is found on the web that can inform living out our Baptismal Covenant and the Five Marks of Mission.

Finally, many Christian Formation leaders in congregations have developed materials that they use and which would be helpful to others. This resolution requests that these Christian Formation leaders submit these materials to the electronic resource hubs so they can be used by others.

**A076: COMMEND USE OF CHRISTIAN FORMATION CERTIFICATIONS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention commend to all dioceses and congregations the use of Christian Formation Certifications as a way to encourage professional development for both paid and unpaid Christian Formation leaders and to deepen the Church’s commitment to the value and status of lay Christian Formation leaders; and be it further

*Resolved*, That the 78th General Convention commend the work of Forma in having developed through Faith Formation Academy the Certificate in Leadership for Lifelong Christian Formation and the Certificate for Youth and Family Ministry; the programs at Virginia Theological Seminary; the Seminary of the Southwest’s Certificate Program in Christian Formation; General Theological Seminary’s Certificate in the Spiritual Guidance of Children; and the programs of other recognized entities offering continuing education opportunities and certification for those called to the ministry of Christian Formation; and be it further

*Resolved*, That the Episcopal Church Center promote awareness of these certification programs.

**EXPLANATION**

In recent years, the positions of numerous congregational and diocesan Christian Formation leaders have been eliminated due to budget limitations. At the same time, membership in Forma has grown, and more congregations are requesting ideas for resources and programming to provide educational ministries for children, youth, and adults. People with the skills and talents of Christian Education and Formation are needed more than ever.

Christian Formation leaders, facilitators, and teachers who are called to this ministry — paid or unpaid — need continuing education and resources to do their ministry well. Our research shows that certification is desired by Christian Formation leaders, teachers, and directors in many dioceses and congregations; and that certification programs are effective in increasing competence, confidence, and networking.

This resolution does not mandate certification for those called to the ministry of Christian Formation and Education, but reaffirms those who desire to continue their education and professional development.

**A077: PUBLICIZE RESOURCES FOR PEOPLE WITH SPECIAL NEEDS**

*Resolved*, the House of \_\_\_\_\_ concurring, That The Episcopal Church recognize that all people are children of God and that those with developmental disabilities may require different approaches to education and pastoral care; and be it further

*Resolved*, That the 78th General Convention direct the Episcopal Church Center to publicize, through the Episcopal Church website and by other appropriate means, to dioceses, congregations, and Christian Formation leaders, compilations of resources that will help educators and clergy in the formation of persons with developmental disabilities.

**EXPLANATION**

Resolution Do68 (Address Education and Pastoral Care of Developmentally Disabled) of the 77th General Convention directed the creation of a task force “to study what resources are currently available [for persons with developmental disabilities] and to create resources that can be used to help educators and clergy to tend to this population.”

The Do68 Task Force and the Standing Commission on Lifelong Christian Formation and Education received three lists of resources compiled by others that will be helpful to educators and clergy in this ministry. These lists of resources have been provided to the Formation and Vocation Ministries Team at the Episcopal Church Center.

The proposed resolution calls for the Episcopal Church Center to make these resources more widely known and available to Christian Formation leaders and clergy.

**A078: REAFFIRM THE CHARTER FOR LIFELONG CHRISTIAN FORMATION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention commend the ministry of Christian Formation and education leaders in The Episcopal Church for continuing to lift up *The Charter for Lifelong Christian Formation* adopted as Resolution A082 at the 76th General Convention; and the importance of inviting, inspiring, and transforming all people, lay and ordained, in the Christian Faith as well as the continued development of training for leaders of the Church; and be it further

*Resolved*, That dioceses and congregations adopt *The Charter for Lifelong Christian Formation* and annually review the ways in which their Christian Formation ministries reflect and embody *The Charter*.

**EXPLANATION**

*The Charter for Lifelong Christian Formation* ([http://www.episcopalarchives.org/cgi-bin/acts/acts\\_resolution.pl?resolution=2009-A082](http://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2009-A082)) should continue to inform the work of The Episcopal Church and all persons involved in Christian Formation and Education. Having *The Charter* adopted by dioceses and congregations and reviewed at least annually by them will remind Episcopalians that Christian Formation is a lifelong process and encompasses more than education.

**A079: RECOMMEND MEMBERSHIP IN FORMA**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention commend Forma for its leadership in building a network of lay and ordained persons engaged in Christian Formation and Education, assisting in the exchange of information among Christian Formation leaders, and providing resources and certification programs for lay and ordained persons engaged in Christian Formation and Education; and be it further

*Resolved*, That dioceses and congregations encourage lay and ordained persons engaged in Christian Formation and Education to become members of Forma and, where possible, to pay their dues.

#### EXPLANATION

Forma (<http://www.episcoforma.org>) is a network that assists Christian Formation leaders — clergy and lay persons — in the conduct of their ministries. In addition to its online resources, Forma holds an annual conference and maintains a Listserv to enable members to share recommendations and information.

This networking is a great service to Christian Formation leaders, particularly those in small congregations. The Commission strongly urges persons engaged in Christian Formation and Education to become members of Forma. The annual dues are nominal.

## Budget

The Standing Commission on Lifelong Christian Formation and Education was provided a triennial budget of \$16,000 and expended a total of less than \$10,000 as of November 30, 2014. The Commission does not expect to incur any significant expenses in 2015.

SCLCFE understands that, unlike 2012, there will not be an Initial Meeting of all Committees, Commissions, Agencies, and Boards in 2015.

Assuming that CCABs continue after 2015, SCLCFE will need to hold at least two in-person meetings during the 2016-2018 triennium — one in early 2016 to set its agenda and work program for the 2016-2018 triennium, and another meeting in late 2017 to prepare its Blue Book report for General Convention 2018.

In addition, the Commission will meet using Adobe Connect or similar electronic means at least five times during the next triennium.

We are advised that the average cost per person for a three-day, in-person meeting is \$1,100. Accordingly, the two in-person meetings and the Adobe Connect meetings will require \$14,000 for 2016 and \$14,000 for 2017, for a total of \$28,000 for the triennium for the Commission.

Even if the CCABs do not continue after 2015, we strongly urge that a task force be established to continue to fulfill the mandate of SCLCFE to review formation needs throughout The Episcopal Church and to develop and recommend to the General Convention comprehensive and coordinated policies for children, youth, young adults, adults, and seniors for Lifelong Christian Formation.

# STANDING COMMISSION ON LITURGY AND MUSIC

## Membership

The Rev. Dr. Ruth Meyers, *Chair*, 2015  
The Rt. Rev. Steven Miller, *Vice Chair*, 2015  
Dr. Derek Olsen, *Secretary*, 2018  
The Rev. Dr. Paul Carmona, 2018  
The Rt. Rev. Thomas Ely, 2015  
Ms. Ana Hernández, 2018  
Mr. Drew Nathaniel Keane, 2018  
The Rt. Rev. John McKee Sloan, 2015  
Mr. Beau Surratt, 2015  
The Rev. Dr. Louis Weil, 2015  
The Rev. Canon Sandye Wilson, 2018  
The Very Rev. Dr. Brian Baker, *Liaison of Executive Council*, 2015  
The Rev. Canon Amy Chambers Cortright, *Representative of the House of Deputies*, 2015  
The Rev. Canon Gregory Howe, *Custodian of the Standard Book of Common Prayer, Ex Officio*, 2015  
The Very Rev. Dr. William H. Petersen, *Consultant; Representative to Consultation on Common Texts*  
Mr. Davis Perkins, *Church Publishing Incorporated Liaison*  
The Rev. Angela Ifill, *Church Center Staff*, 2015

### *Changes in Membership*

Mr. Dent Davidson resigned in April 2013 and was not replaced. Mr. John Repulski, Vice Chair, resigned in February 2014 and was replaced by Mr. Beau Surratt; The Rt. Rev. Steven Miller was elected Vice Chair. Br. Christopher Hamlett, OP, resigned in August 2014 and was not replaced. The Rev. Chris Cunningham resigned from Executive Council and was replaced by The Very Rev. Dr. Brian Baker in December 2013. Mr. Davis Perkins replaced Ms. Nancy Bryan as Church Publishing Incorporated Liaison in October 2013.

### *Representation at General Convention*

Bishop Steven Miller and Deputy Sandye Wilson are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** Canon I.1.2(n)(6) directs the Standing Commission on Liturgy and Music to:

- (i) Discharge such duties as shall be assigned to it by the General Convention as to policies and strategies concerning the common worship of this Church.
- (ii) Collect, collate, and catalogue material bearing upon possible future revisions of the Book of Common Prayer.
- (iii) Cause to be prepared and to present to the General Convention recommendations concerning the Lectionary, Psalter, and offices for special occasions as authorized or directed by the General Convention or House of Bishops.
- (iv) Recommend to the General Convention authorized translations of the Holy Scripture from which the Lessons prescribed in the Book of Common Prayer are to be read.
- (v) Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.

- (vi) Collect, collate, and catalogue material bearing upon possible future revisions of The Hymnal 1982 and other musical publications regularly in use in this Church and encourage the composition of new musical materials.
- (vii) Cause to be prepared and present to the General Convention recommendations concerning the musical settings of liturgical texts and rubrics, and norms as to liturgical music and the manner of its rendition.
- (viii) At the direction of the General Convention, serve the Church in matters pertaining to policies and strategies concerning Church music.

### Meetings

#### *Face-to-Face:*

- Nov. 12-15, 2012 (St. Louis, MO)
- June 24-26, 2013 (Milwaukee, WI)
- Oct. 20-23, 2014 (Concord, NH)

#### *Tele/Web Conference:*

- Jan. 23, 2013
- Apr. 18, 2013
- Sep. 10, 2013
- Dec. 18, 2013
- Feb. 25, 2014
- May 6, 2014
- Sep. 11, 2014
- Nov. 18, 2014

### **Resources for Blessing Same-Sex Relationships (Resolution 2012-A049)**

*Subcommittee Members:* Ruth Meyers, Chair; Drew Nathaniel Keane, Scribe; Brian Baker; Amy Chambers Cortright; Thomas Ely; Christopher Hamlett OP; Beau Surratt

*Consultant, Liturgical Resource:* Patrick Malloy (Bethlehem)

*Consultant, Canonical Resource:* Joan Geiszler-Ludlum (East Carolina)

*Ad Hoc Task Group, Pastoral Resource:* Cathy Dempsey-Sims (Western New York); Caroline Hall (El Camino Real); Anne LeVeque (Washington)

*Survey Consultant:* Thaddeus Bennett (Vermont)

*Tele/Web Conference Meetings:* May 30, 2013; Aug. 20, 2013; Dec. 11, 2013; Feb. 5, 2014; Feb. 26, 2014; Apr. 8, 2014; Apr. 30, 2014; May 14, 2014; May 28, 2014; July 9, 2014; Aug. 28, 2014; Nov. 11, 2014

*Face-to-Face Meeting:* June 3-6, 2014 (Kansas City, MO)

At the beginning of the triennium, the Commission asked all bishops whether they had authorized the liturgy in “Liturgical Resources 1: I Will Bless You, and You Will Be a Blessing” and if so, whether they had authorized any revisions to meet the needs of members of this Church, in accord with Resolution 2012-A049.

The Commission also asked each bishop to identify a contact person in their diocese who could help gather responses to the resources. As of January 9, 2014, the Commission had received 55 responses, 38 indicating that they had authorized the rite, 12 stating that they had not, and the remaining 5 giving no indication. The Archives of The Episcopal Church created a publicly accessible digital archive of responses received, including guidelines submitted by a number of dioceses: <http://www.episcopalarchives.org/SCLM/2012-A049/>

To gauge responses to the resource, the Commission developed an online survey, made available through diocesan contacts and social media from September through December 2013. Almost 1,000 people accessed the survey. Responses were overwhelmingly positive to every section of the resource.

Two members of the Commission, Ruth Meyers and Steven Miller, represented The Episcopal Church at the International Anglican Liturgical Consultation when it met in Dublin, Ireland, in August 2013 and made a presentation about the new resources. Responses included interest and support as well as opposition to this work.

In June 2014, the Commission hosted an international, ecumenical, indaba-style consultation on same-sex marriage at Grace and Holy Trinity Cathedral, Kansas City, Missouri, inviting participation from every diocese of The Episcopal Church and every province of the Anglican Communion where civil marriage is legal for same-sex couples and from ecumenical partner churches in the United States. Fifty-seven people, representing 24 dioceses of The Episcopal Church, 6 other churches of the Anglican Communion, and 5 ecumenical partners, along with the President of the House of Deputies, Presiding Bishop, and Secretary of General Convention participated.

Two dioceses of The Episcopal Church and two Provinces of the Anglican Communion declined to send representatives. While none of the participants in the consultation was opposed to same-sex marriage, the conversation enabled the Commission to understand more deeply the issues facing clergy and same-sex couples in contexts where civil marriage is legal.

Feedback from the survey and at the consultation indicated a strong desire on the part of some same-sex couples to use a liturgy similar to the marriage rite in the Book of Common Prayer and a desire on the part of some different-sex couples to use the alternative liturgy in Liturgical Resources 1.

The Commission is therefore proposing four liturgies for authorization by General Convention 2015: 1) a revision of “The Witnessing and Blessing of a Lifelong Covenant,” taking into account specific feedback received from those who have used the text; 2) “The Witnessing and Blessing of a Marriage,” an adaptation of the revised rite for use by any couple who can be married according to civil law; 3) a gender-neutral adaptation of “The Celebration and Blessing of a Marriage” from the 1979 Book of Common Prayer; and 4) “The Form of Solemnization of Matrimony,” a gender-neutral adaptation of the 1928 Book of Common Prayer, providing same-sex couples with an option similar to that available to different-sex couples who use the 1928 BCP marriage rite by following “An Order for Marriage” (BCP 1979, pp. 435-36).

Participants in the consultation criticized the pastoral resource for its treatment of gay, lesbian, bisexual, and transgender people. The Commission therefore commissioned an ad hoc working group from the consultation to recommend revisions.

Hearing numerous requests for clarification about how the new rite relates to the Church’s teaching on marriage, the Commission considered proposals for a gender-neutral revision of the marriage canon (1.1.18). However, the Commission decided not to propose a canonical revision, recognizing that the Task Force on the Study of Marriage created by Resolution 2012-A050 has undertaken a more in-depth study of marriage and will be proposing a canonical revision that coheres more fully with the theology of marriage.

In response to the direction of Resolution 2012-A049 to develop the theological resource, the Commission invited six Anglican theologians to prepare responses to the essay in Liturgical Resources 1. These theologians represent different theological disciplines and diverse perspectives on same-sex marriage. The Commission proposes that these essays be included as signed appendices to the theological resource.

Recognizing the significant changes in civil law since 2012, the Commission asked a canon lawyer to review the canonical resource. Rather than revise this section, the Commission is proposing a new section on the history of the marriage canon, prepared by the Task Force on the Study of Marriage.



**PROPOSED RESOLUTIONS**

**A054: ADOPT RESOURCES AND RITES FROM “LITURGICAL RESOURCES I: I WILL BLESS YOU AND YOU WILL BE A BLESSING, REVISED AND EXPANDED 2015”**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention commend “Liturgical Resources I: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015,” as found in the Blue Book, for study and use in congregations and dioceses of The Episcopal Church; and be it further

*Resolved*, That the 78th General Convention authorize for use “The Witnessing and Blessing of a Lifelong Covenant” from “Liturgical Resources I: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015,” beginning the First Sunday of Advent 2015; and be it further

*Resolved*, That the 78th General Convention authorize for use “The Witnessing and Blessing of a Marriage,” “The Celebration and Blessing of a Marriage 2,” and “The Form of Solemnization of Matrimony” from “Liturgical Resources I: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015,” beginning the First Sunday of Advent 2015, under the direction of the bishop exercising ecclesiastical authority; and be it further

*Resolved*, That bishops, particularly those in dioceses within civil jurisdictions where same-sex marriage, civil unions, or domestic partnerships are legal, may continue to provide generous pastoral response to meet the needs of members of this Church; and be it further

*Resolved*, That the provision of Canon I.18.4 applies by extension to “Liturgical Resources I: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015,” namely, “It shall be within the discretion of any Member of the Clergy of this Church to decline to” preside at any rite contained herein; and be it further

*Resolved*, That the provisions of Canon I.19.3 regarding marriage after divorce apply equally to all the rites of “Liturgical Resources I: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015,” in accordance with guidelines established by each diocese; and be it further

*Resolved*, That this convention honor the theological diversity of this Church in regard to matters of human sexuality; and that no bishop, priest, deacon or lay person should be coerced or penalized in any manner, nor suffer any canonical disabilities, as a result of his or her theological objection to or support for the 78th General Convention’s action contained in this resolution; and be it further

*Resolved*, That the Standing Commission on Liturgy and Music continue to monitor the use of this material and report to the 79th General Convention; and be it further

*Resolved*, That the 78th General Convention direct the Secretary of General Convention, in consultation with the outgoing Chair of the Standing Commission on Liturgy and Music and the Chairs of the Legislative Committees to whom this legislation is referred, to finalize and arrange for the publication of the material

contained in “Liturgical Resources 1: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015” as approved by the 78th General Convention, no later than the first Sunday of Advent 2015.

#### EXPLANATION

The 77th General Convention commended for study and use the resources contained in “Liturgical Resources I: I Will Bless You and You Will Be a Blessing” and directed the Standing Commission on Liturgy and Music (SCLM) to further develop the theological resource, review the entire resource, and invite responses. The revised and expanded edition reflects this process of review and development as detailed in the SCLM Report to the 78th General Convention.

The liturgical rite, “The Witnessing and Blessing of a Lifelong Covenant” has been well received and widely used, and the SCLM now recommends that the revised rite be widely available. In addition, rapid changes in civil law concerning marriage in the United States, along with the responses received as part of the SCLM church-wide consultation process, indicate a need for equivalent proper liturgies in jurisdictions where same-sex marriage is legal. Further, the SCLM consultation process indicated a pastoral need for equivalent marriage rites that could be used by any couple.

#### **Calendar Committee (Resolutions 2012-A051, A052, B025, C013, C053, C070, C090, C106, C112, D056, D088)**

*Members:* Derek Olsen, Co-chair; Sandye Wilson, Co-chair; Steven Miller; William Petersen, Louis Weil

*Consultant:* Dan Joslyn-Siemiatkoski (California)

*Tele/Web Conference Meetings:* Nov. 13, 2013; Dec. 3, 2013; June 26, 2014; Sep. 4, 2014

During this triennium the SCLM was tasked with considering additions to *Holy Women, Holy Men* and to continuing work on this resource. In addition, it was deemed necessary to revise a number of collects. Moreover, the Commission was mindful of other concerns: the desire to achieve more gender balance, the increasing number of commemorations, and most importantly, given the baptismal ecclesiology of the Book of Common Prayer, whether one unbaptized could be considered “holy.”

This discussion led us to propose a new way forward, which we have entitled, “A Great Cloud of Witnesses: A Calendar of Commemorations.” Following in the tradition of *Lesser Feasts and Fasts/Holy Women, Holy Men*, “A Great Cloud of Witnesses” contains all of those people authorized for the Calendar by General Convention through 2006. Most of the individuals submitted in 2009, and those approved at the 2012 General Convention, are also included. Criteria for the inclusion of additional names are laid out in detail below. As in previous works, names are organized by date of traditional commemoration, usually the date of death.

Each entry will include a biographical narrative giving a sense of the person or event, and how their life and witness has contributed to who we are today. A devotional collect in both Rite I and Rite II language will also be included. (For the sake of space in the Blue Book, narratives and collects already authorized and included in *Holy Women, Holy Men* are not reproduced here.)

New to this resource is a set of indexing “tags” that will contribute to a better understanding of how the entry fits into the broader scope of church history. These identify Commons of Various Occasions and Commons of Saints related to the life, work, or impact of the occasion; and they will also identify main spheres of influence and how they are commemorated (if at all) in their home church and in churches across the Anglican Communion.

Should a local community identify a person for commemoration, the Commons of Saints indicated provide appropriate propers. Alternatively, a Eucharist celebrating a related Various Occasion might include the devotional collect within the conclusion to the Prayers of the People. The current Commons have been

enriched through the addition of more options for biblical readings that will allow a community to more closely tailor the set of readings to the witness of the person celebrated.

Most of these Commons are drawn from the BCP and *Holy Women, Holy Men*, with some revisions reflective of the feedback process following the 2009 General Convention, notably the aforementioned collect revisions in which the focus is shifted from the biography of the person or persons commemorated to the virtues and charisms expressed in their life and witness.

*Weekday Eucharistic Propers 2015* contains all propers needed for celebrations of the Eucharist on days for which a commemoration is not observed. Materials for the weekdays during the seasons of the church year are collected together in their appropriate seasonal sequence, thus presenting a central resource for the church seasons. Commons of Saints from the BCP and *Holy Women, Holy Men*, and Propers for Various Occasions from the BCP and *Holy Women, Holy Men*, follow. Despite their inclusion in the Book of Common Prayer, these commons and propers have not seen widespread use. Giving them their due visibility and a more complete explanation of their function, and assigning them expanded biblical readings, should help them become more widely known.

AO55: REVISE LITURGICAL COMMEMORATIONS

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention authorize the following deletions from the Calendar and liturgical propers set forth in *Holy Women, Holy Men: Celebrating the Saints*:

- 4/12 Adoniram Judson, Missionary to Burma, 1850
- 4/22 John Muir, Naturalist and Writer, 1914; and Hudson Stuck, Priest and Environmentalist, 1920
- 7/1 Harriet Beecher Stowe, Writer and Prophetic Witness, 1896
- 7/12 Nathan Soderblom, Archbishop of Uppsala and Ecumenist, 1931
- 7/13 Conrad Weiser, Witness to Peace and Reconciliation, 1760
- 8/23 Toribio de Mogrovejo, 1606 [retaining Martin de Porres, 1639, and Rosa de Lima, 1617, Witnesses to the Faith in South America]
- 9/3 Prudence Crandall, Teacher and Prophetic Witness, 1890
- 9/8 Nikolai Grundtvig, Bishop and Hymnwriter, 1872
- 9/8 Soren Kierkegaard, Teacher and Philosopher, 1855
- 10/19 William Carey, Missionary to India, 1834
- 12/10 Karl Barth, Pastor and Theologian, 1968
- 12/15 John Horden, Bishop and Missionary in Canada, 1893
- 12/15 Robert McDonald, Priest, 1913
- 12/17 William Lloyd Garrison, 1879 [retaining Maria Stewart, 1879, Prophetic Witness]
- 12/19 Lillian Trasher, Missionary in Egypt, 1961
- 12/22 Charlotte Diggs (Lottie) Moon, Missionary in China, 1912;

and be it further

Resolved, That the 78th General Convention authorize the following additions to the Calendar set forth in “*Holy Women, Holy Men: Celebrating the Saints*”:

- 7/26 Charles Raymond Barnes, 1938
- 8/18 Artemisia Bowden, 1969
- 9/4 Albert Schweitzer, 1965
- 9/18 Dag Hjalmar Agne Carl Hammarskjold, 1961

9/24 Anna Ellison Butler Alexander, 1947  
 10/24 Hiram Hisanori Kano, 1986;

and be it further

Resolved, That the General Convention authorize for trial use the new and revised collects for commemorations as found in the Blue Book.

EXPLANATION

*Holy Women, Holy Men* first authorized for trial use in 2009, added more than 100 commemorations to the Calendar. The Standing Commission on Liturgy and Music reviewed responses received during the trial-use period and identified commemorations for which significant objections were raised. In addition, the Commission developed new or revised collects for a number of commemorations in response to concerns that the existing liturgical texts were overly didactic.

A056: AUTHORIZE NEW LITURGICAL RESOURCES: A GREAT CLOUD OF WITNESSES; WEEKDAY EUCHARISTIC PROPER  
 Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention authorize for trial use the liturgical resource entitled, “A Great Cloud of Witnesses: A Calendar of Commemorations” (GCW) as outlined in the Blue Book, replacing *Holy Women, Holy Men*; and be it further

Resolved, That the General Convention affirm the following criteria for further additions to this resource:

Criterion 1

**Historicity:** Christianity is a radically historical religion, so in almost every instance it is not theological realities or spiritual movements, but exemplary witness to the Gospel of Christ in lives actually lived that is remembered in our family story. Like all families, however, our family includes important matriarchs and patriarchs about whom little verifiable information is known, yet whose names and influence still exert influence on how we understand ourselves in relation to them.

Criterion 2

**Christian Discipleship:** The family story captured here is uniquely and identifiably a Christian story. This set of stories commemorates the ways particular Christians live out the promises of baptism. A worthy summary of these promises is captured in our Baptismal Covenant, including a commitment to the Triune God as captured in the Apostles’ Creed; continuing in the apostles’ teaching and fellowship, the breaking of bread and the prayers; resisting evil and repenting when necessary; proclaiming by word and example the Good News of God in Christ; seeking and serving Christ in all persons; and striving for justice and peace among all people. Rather than being an anachronistic checklist, these should be considered general guidelines for considering holistic Christian life and practice. There may be occasional exceptional cases where not all of these promises are successfully kept, or when the person in question is not a

Christian, yet the person's life and work still significantly impacts the ongoing life of the Church and contributes to our fuller understanding of the Gospel.

Criterion 3

**Significance:** Those remembered should have been in their lifetime extraordinary, even heroic servants of God and God's people for the sake, and after the example, of Jesus Christ. They may also be people whose creative work or whose manner of life has glorified God, enriched the life of the Church, or led others to a deeper understanding of God. In their varied ways, those remembered have revealed Christ's presence in, and Lordship over, all of history; and continue to inspire us as we carry forward God's mission in the world.

Criterion 4

**Range of Inclusion:** Particular attention should be paid to Episcopalians and other members of the Anglican Communion. Attention should also be paid to the inclusion of people of different genders and races, of lay people (witnessing in this way to our baptismal understanding of the Church), and of ecumenical partners and people who have had their own distinctive influence upon us. In addition to the better-known, it is important also to include those "whose memory may have faded in the shifting fashions of public concern, but whose witness is deemed important to the life and mission of the Church" (Thomas Talley).

Criterion 5

**Local Observance:** Normally, significant remembrance of a particular person already exists within the Church at the local and regional levels before that person is included in the Church's larger story.

Criterion 6

**Perspective:** The introduction of new names should be done with a certain economy lest the balance of the whole be overwhelmed. In the cases of the recently departed — particularly in the case of controversial names — care should be given to seeing them from the perspective of history. Names added should show a broad influence upon the Church and should result from a widespread desire expressed across the Church over a reasonable period of time.

Criterion 7

**Combined Remembrances:** Not all those included need to be remembered "in isolation." Where there are close and natural links between persons to be remembered, a joint commemoration would make excellent sense (e.g., the Reformation martyrs, Latimer and Ridley; and two bishops of Lincoln, Robert Grosseteste and Hugh); and be it further

Resolved, That the General Convention authorize for trial use the liturgical resource entitled, “Weekday Eucharistic Propers 2015,” as outlined in the Blue Book, replacing *Holy Women, Holy Men*; and be it further

Resolved, That the General Convention direct the Standing Commission on Liturgy and Music to gather feedback from congregations, seminaries, religious orders, and other eucharistic communities on these two resources and to report to the next General Convention; and be it further

Resolved, That the General Convention direct the Secretary of General Convention, in consultation with the outgoing Chair of the Standing Commission on Liturgy and Music and the Chairs of the Legislative Committees to whom this legislation is referred, to finalize and arrange for the publication of the material contained in “A Great Cloud of Witnesses” and in “Weekday Eucharistic Propers 2015” as approved by the 78th General Convention.

#### EXPLANATION

“A Great Cloud of Witnesses: A Calendar of Commemorations” and “Weekday Eucharistic Propers 2015” together replace *Holy Women, Holy Men*. It is our hope that the new paradigm reflected in “A Great Cloud of Witnesses” honors the feedback that the Standing Commission on Liturgy and Music received during trial use since the 76th General Convention (2009) first authorized *Holy Women, Holy Men* and more fully engages the emphasis on the local experience of sanctity underscored in Resolution 2003-A100.

This calendar of commemorations is intended to replace commemorations in the Calendar of the 1979 Book of Common Prayer, except for the Feasts of our Lord and other Major Feasts listed on pp. 16-17. After gathering and considering feedback on “A Great Cloud of Witnesses,” the Standing Commission on Liturgy and Music will bring to the 79th General Convention a proposal for the Calendar of the BCP.

The criteria for additions to “A Great Cloud of Witnesses” are a revision of criteria previously approved for *Holy Women, Holy Men* developed in response to comments and questions. Criterion 2, “Christian Discipleship,” permits the inclusion of “occasional exceptional cases where the person in question is not a Christian.”

The Commission has in mind circumstances such as the Dorchester Chaplains (February 3), three Christian clergy and a Jewish rabbi who together exhibited heroic witness during World War II when the troop ship Dorchester was hit by enemy fire and sank; the interfaith nature of their witness is a key aspect of the commemoration, and the Commission believes this is an appropriate exception to the norm of Christian discipleship.

In criterion 6, “Perspective,” the commission is proposing that “a reasonable period of time” have elapsed before a name is added, without specifying how many years after a person has died, and allowing General Convention to exercise its judgment about whether an individual or group should be added to the calendar. For example, recent General Conventions authorized the addition of Supreme Court Justice Thurgood Marshall (May 17), who died in 1993; and the Rev. Pauli Murray (July 1), who died in 1985. Martyrs have also been added to the calendar within in a relatively short time after their death — for example, the Martyrs of the Sudan (May 16) and Jonathan Daniels (August 14).

The companion text, “Weekday Eucharistic Propers 2015” places seasonal collects and lections for weekday celebrations together with commons for commemorating saints and lections for Various Occasions, clearly presenting the variety of options for weekday celebrations of the eucharist. Placing the material in separate volumes creates books of a more manageable size for liturgical use.

A057: CREATE ADDITIONAL LITURGICAL COMMEMORATIONS

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention instruct the Standing Commission on Liturgy and Music to create collects and biographies for the following persons to be presented to the 79th General Convention for consideration for inclusion in “A Great Cloud of Witnesses”:

Gladys Aylward (1/3)  
 Amma Syncletica of Alexandria (1/5)  
 Caesaria of Arles (1/12)  
 Marcella (1/31)  
 Scholastica, Religious, 543 (2/10)  
 Katherine Drexel (4/3)  
 Mary of Egypt (4/3)  
 Kateri Tekakwitha (4/17)  
 Maria Gabriella Sagheddu (4/22)  
 Marie de l’Incarnation, Educator and Spiritual Teacher in New France, 1672 (4/30)  
 Helena, Protector of the Holy Places, 330 (5/21)  
 Olga of Kiev (7/11)  
 Bridget of Sweden, Founder of Bridgettine Order, 1373 (7/23)  
 Jane Frances de Chantal, Religious (8/12)  
 Paula and Eustochium (9/28)  
 Mother Theodore (Anne-Therese) Guerin, Religious, Educator, Prophetic Witness, 1856 (10/3)  
 Elizabeth Fry, Prison Reformer, 1845 (10/12)  
 Catherine of Alexandria (11/5)  
 Elizabeth of the Trinity (11/8)  
 Gertrude the Great and Mechtild of Hackeborn (11/16)  
 Dorothy Day (11/29)  
 Ella Baker (12/13)  
 Emily Ayckbowm, Founder of the Sisters of the Community of the Church, 1870  
 Kate Harwood Waller Barrett  
 Etheldred Berry  
 Mary McLeod Bethune  
 Louise De Koven Bowen, Hull House  
 Josephine Butler  
 Anna Bessant Cassey and Henrietta Lockwood  
 Rosa Judith Cisneros  
 Florence Converse  
 Ella Cara Deloria, Native American Poet and Writer  
 Helen Fuller  
 Ann Gream  
 Angelina and Sarah Grimke  
 Sister Margaret Hawk, Church Army, Native American Activist  
 Addie D. Waites Hunton  
 Satoko Kitahara  
 Susan Trevor Knapp, NY Training School for Deaconesses  
 Eva Lee Matthews and Beatrice Henderson  
 Victoria Earle Matthews, Author and Settlement House Worker, 1907  
 Eleanor Laura McMain  
 Harriet O’Brien Monsell  
 Maria Montessori

Anna Newell, St. Margaret's House, Berkeley  
 Phoebe Palmer  
 Katherine Parr  
 Ellen Albertina Polyblank [Sister Albertina] & Elizabeth Ann Rogers [Sister Beatrice]  
 Richeldis of Faverches  
 Eleanor Roosevelt  
 Dorothy Sayers  
 Mary Kingsbury Simkovitch, Greenwich House, NYC  
 Therese of Lisieux  
 Adeline Blanchard Tyler  
 Ruth Elaine Younger (Mother Ruth, CHS);

and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$15,700 for the implementation of this resolution.

EXPLANATION

For many years, the Church's Calendar of Commemorations has not reflected the diversity of the Church. Resolution 1985-D101 directed that the Standing Liturgical Commission take steps to add more women. Yet when work began on *Holy Women, Holy Men* in 2003, women made up only a small minority of commemorations. *Holy Women, Holy Men* contributed to the diversity of the Calendar in many ways, but as of 2012 women still accounted for a small minority of commemorations. Resolution 2012-A052 directed the Standing Commission on Liturgy and Music to identify women suitable for inclusion in the Calendar of the Church Year.

The list of people recommended here for commemoration represent a significant effort to address the gender disparity in the current Calendar. If these proposals are authorized for trial use in 2018, women will become one-third of those included in "A Great Cloud of Witnesses."

The SCLM has proposed seven criteria for commemorations to be included in "A Great Cloud of Witnesses," updating guidelines approved by previous General Conventions for *Holy Women, Holy Men*. Criteria 4, 5, and 6 represent a delicate balance. Criterion 4 notes that "it is important also to include those 'whose memory may have faded in the shifting fashions of public concern, but whose witness is deemed important to the life and mission of the Church' [Thomas Talley]."

Criteria 5 and 6 call for both "significant remembrance" at "local and regional levels" and for a "reasonable period of time" between the death of these people and their inclusion in the calendar. In compiling this list we have emphasized criterion 4. Throughout Christian history, many significant women have not received due recognition due to the structure of the Church.

The classical emphasis on bishops and clergy has furthered the gender bias of the Calendar, since women have only been ordained in The Episcopal Church for 40 years. Of the laity in the Calendar, most are royals or religious, and women constitute a small minority within that minority. The SCLM is thus proposing a number of women, clergy and lay, many of whom have died more recently, for inclusion in our Calendar for the inspiration and guidance of contemporary Episcopalians.

The budget allocation would allow a subcommittee of six members to meet two times during the triennium, with additional funds available for a consultant to assist with compiling and editing the new material.



**Liturgical Materials for Honoring God in Creation (Resolution 2012-A053)**

*Subcommittee Members:* Ana Hernández, Drew Nathaniel Keane, Ruth Meyers

The 76th General Convention referred to the SCLM Resolutions 2009-C034 and 2009-D001 (Develop a Pentecost Season Creation Cycle). During the 2010-2012 triennium, a committee chaired by SCLM Vice Chair, The Rev. Jennifer Phillips, in collaboration with the Executive Council Committee on Science, Technology and Faith, developed a collection of “Liturgical Materials Honoring God in Creation.”

At the 77th General Convention, the legislative committees on Prayer Book, Liturgy, and Music reviewed the material and determined that the texts would be improved by further editing. Accordingly, the General Convention referred Resolution 2012-A053 to the SCLM.

During the current triennium, a team of SCLM members (meeting primarily via Skype and Google Hangout) prayed each text aloud and revised many of the materials. The Commission believes that the material is now ready for use in congregations and other worshiping communities.

Resolutions 2009-C034 and 2009-D001 called for the development of an optional “creation cycle” during the season after Pentecost. However, the Commission recommends that the propers for honoring God in creation be made available for a variety of liturgical occasions (for example, a Lenten weekday series of worship services to accompany environmental education classes), rather than supplanting the Sunday eucharistic lectionary.

Each of the three forms of Prayers of the People Honoring God in Creation accords with the rubrics for the Prayers of the People (BCP p. 359), and these are suitable for use in a Sunday liturgy. Three forms of Confession of Sin against God’s Creation and A Litany for the Planet are also included in these resources.

A Rogation Day Procession and Liturgy, and Prayers for Rogation Day: A Rite for the Blessing of a Garden may be used on the traditional Rogation Days (Monday, Tuesday, and Wednesday before Ascension Day) or at some other time appropriate to the local context. A Liturgy in Thanksgiving for Creation and in Honor of the Feast of St. Francis, with the Blessing of Animals, as well as Additional Readings and Resources for St. Francis Day, may be used for the commemoration of Francis of Assisi (October 4) or on some other occasion when God’s people gather to pray for the earth and its creatures.

**A058: AUTHORIZE LITURGICAL MATERIALS FOR HONORING GOD IN CREATION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention authorize Liturgical Materials Honoring God in Creation, found in the Blue Book, for use in The Episcopal Church; and that the materials be made freely available; and be it further

*Resolved*, That the Standing Commission on Liturgy and Music consider these liturgical materials for inclusion in a revised edition of the Book of Occasional Services.

**EXPLANATION**

These materials respond to the desire for liturgical materials for a season of creation as expressed in resolutions proposed to the 76th General Convention. Rather than establishing a season of creation, these liturgical texts allow congregations and other groups to honor God in creation in a variety of contexts.

**Book of Occasional Services/ Enriching Our Worship (Resolution 2012-A056)**

*Subcommittee Members:* Paul Carmona, Chair; Amy Chambers Cortright; Thomas Ely; Gregory Howe; Angela Ifill; Drew Keane

*Tele/Web Conference Meetings:* June 11, 2014; July 24, 2014

Resolution 2012-A056 directed “the Standing Commission on Liturgy and Music to continue its work on a revision of the Book of Occasional Services and report its progress to the 78th General Convention.”

### The Need for Revision

A variety of considerations indicate that a revision of the Book of Occasional Services is both desirable and necessary. Among the more noteworthy of these considerations are the following:

- With the passage of time, many significant new needs have become apparent, and a revision of BOS 2003 is overdue.
- In response to requests for input, the BOS/EOW Subcommittee has received many recommendations that express a desire for a broader range of BOS resources, especially to serve urgent pastoral needs and increasingly diverse populations in TEC.
- Many worthwhile new liturgical resources have become available during the years since the BOS 2003 was authorized. The inclusion of some of these newer resources would enhance and broaden the BOS.
- The minimally descriptive table of contents of the current BOS provides, at best, an overly general listing of the many useful resources contained therein. There is also no indexing whatsoever. A more expansive and better-organized table of contents, along with the addition of a detailed index, will make the specific resources of a revised BOS more apparent and easier to find.
- Incidences of awkward or needlessly archaic language in BOS 2003 need to be revised or adapted for better spoken fluidity and for inclusive or expansive language.

### Purpose and Criteria

To clarify the objectives, scope, and general guidelines for BOS revision, the Subcommittee — with the concurrence of the Commission — formulated the following statement of purpose and list of criteria for the BOS.

#### **Purpose:**

The Book of Occasional Services is a collection of liturgical and catechetical resources in support of the fundamental liturgical life of The Episcopal Church.

#### **Criteria for Resources in the BOS:**

Primarily, resources included in the BOS should

1. Complement or supplement the BCP, but not duplicate the resources it contains;
2. Be consistent with the theological, sacramental, and liturgical ethos of the BCP;
3. Pertain to a specific occasion, need, or purpose that does not occur generally or frequently enough to warrant inclusion in the BCP;
4. Draw on liturgical materials that are already being broadly used in worshipping communities.

Secondarily, it is desirable that some of the resources included in the BOS

1. Serve the needs, or reflect the liturgical expressions, of diverse populations within The Episcopal Church;
2. Be adaptable for use by lay persons or clergy in a variety of non-ecclesial settings.

### Review of BOS 2003

The starting point for the Subcommittee’s review of the contents of BOS 2003 was the list of recommendations developed in 2010 by the Subcommittee members who served during the previous triennium. Most of the prior recommendations were retained, but some adjustments and revisions have been added, and input from the larger group of SCLM members has also contributed to this review.

The specific types of recommendations were, namely: to retain, remove, or revise the respective rites or resources contained in BOS 2003. The possible degrees of revision range from slight to extensive, but may also entail the development of completely new material to replace what was previously used. Broadly understood, the intention would be to complete a comprehensive revision of the BOS.

### Gathering of Information and Input

The Subcommittee solicited, and continues to solicit, recommendations for resources that could be included in a new BOS. Such input has so far been requested from: the Standing Commission on Lifelong Christian Formation and Education; TEC's Missioners for Asiamerica, Black, Latino/Hispanic, and Indigenous Ministries; and from various individuals whose interests lie in relevant resource areas.

A variety of unsolicited input has also been accepted for inclusion in the revision process. The Subcommittee also plans to utilize the SCLM's blog site as a tool for requesting and gathering additional input. From its own research efforts, the Subcommittee has identified a number of existing resource collections that contain materials that potentially, perhaps with editing, could be incorporated into the revised BOS. These previously published volumes include, but are not limited to, collections such as:

- *Changes: Prayers and Services Honoring Rites of Passage*. New York: Church Publishing Incorporated, 2007
- *Enriching Our Worship*. 5 vols. New York: Church Publishing Incorporated, 1998-2009
- McElligott, Ann E. P. *The Catechumenal Process: Adult Initiation and Formation for Christian Life and Ministry*. New York: Church Hymnal Corporation, 1990
- Meyers, Ruth A., and Pettingell, Phoebe, eds. *Gleanings: Essays on Expansive Language and Prayers for Various Occasions*. New York: Church Publishing Incorporated, 2001

### Table of Contents

To gain a clearer appreciation of how a revised BOS might look, the Subcommittee has developed a sample table of contents (see below), with the understanding that additional consultation and work need to be done before the definitive table of contents can be finalized. The principal features of the sample table of contents are as follows:

- *Categories and Subcategories*. The BOS 2003 uses only three broad categories to organize its table of contents: the Church Year, Pastoral Services, and Episcopal Services. The sample table maintains these three categories but further subdivides them into a variety of subcategories. In addition to having a more descriptive table of contents, the revised BOS would also include highly detailed indices to help the user make the fullest possible use of the resources contained therein.
- *Increased Variety of Resources*. A category-by-category perusal of the sample table of contents makes evident the comparative scarcity of certain types of resources in BOS 2003 — most obviously in the categories of: Dying, Death, Burial, Commemorations; God's Created Universe; Healing, Sickness, Well-being; and Transitions, Milestones, and Urgent Occasions in Life. In general, the sample table of contents would add new "people-oriented" (pastoral) resources to the relatively more institution-oriented contents of BOS 2003.
- *Broader Array of Cultural Perspectives*. Significant effort has been made to include resources that reflect or support the sensibilities and urgent needs of various cultural and ethnic groups. Such culturally representative resources, however, can also be viewed as significant gifts to the broader Church, particularly because they generally relate to levels of human experience that transcend cultural differences. We see this, for instance, in the Mexican celebration of the Día de los muertos, which is finding widespread popularity far beyond the originating culture.

### **Sample Table of Contents for a Comprehensively Revised Book of Occasional Services:**

#### THE CHURCH YEAR

##### **The Year Round – General Usage**

[The following BOS 2003 resource will be retained or revised:]

Seasonal Blessings (22-29)

[The following may be added to the BOS as new resources:]

Miscellaneous Collects

Blessing of Water and Salt for a Stoup

##### **Advent – Christmas – Epiphany**

[The following BOS 2003 resources will be retained or revised:]

- Concerning the Advent Wreath (30)
- Festival of Lessons and Music for Advent/Christmas (31-34, 38-41)
- Station at a Christmas Crèche (36-37)
- Service for New Year's Eve (42-46)
- Candlemas Procession (53-55)

[The following may be added to the BOS as new resources:]

- Resources for Celebrating *Las Posadas*

### **Lent – Holy Week – Easter**

[The following BOS 2003 resources will be retained or revised:]

- The Way of the Cross (56-73)
- Tenebrae (74-92)
- On Maundy Thursday:
  - At the Foot-washing (93)
  - On Reserving the Sacrament (94)
  - On the Stripping of the Altar (94)
- Agapé for Maundy Thursday (95-96)
- Blessings over Food at Easter (97-98)
- Rogation Procession (103-105)

## PASTORAL SERVICES

### **Christian Initiation and Commitment**

[The following BOS 2003 resources will be retained or revised:]

- Preparation of Adults for Holy Baptism: The Catechumenate (114-130)
- A Vigil on the Eve of Baptism (131-135)
- Preparation of Baptized Persons for Reaffirmation of the Baptismal Covenant (136-145)
- Vigil for the Eve of All Saints' Day or the Sunday after All Saints' Day (106-107)
- Preparation of Parents and Godparents for the Baptism of Infants and Young Children (159-162)

### **Dying, Death, Burial, Commemorations**

[The following BOS 2003 resources will be retained or revised:]

- Burial of One Who Does Not Profess the Christian Faith (175-178)

[The following may be added to the BOS as new resources:]

- Anniversary of a Death
- Burial of a Child
- Burial under Special Circumstances (e.g., at veterans' cemeteries that do not permit graveside rites; also for direct cremation or burial)
- Commemoration of Family Members and Past Generations
- Day of the Dead (*Día de los muertos*)
- Memorial Day Resources
- Rites/Prayers for the Suicide of an Adult
- Rites/Prayers for the Suicide of a Child

### **God's Created Universe**

[The following may be added to the BOS as new resources:]

- Blessing of Animals (Feast of St. Francis)
- Blessings for the Earth (beyond the Rogation prayers found in the BCP)
- Blessing for a New Companion Animal
- Blessing/Prayer upon the Death of a Companion Animal

### **Healing, Sickness, Well-being**

[The following BOS 2003 resources will be retained or revised:]

- Blessing of a Pregnant Woman (157-158)
- Public Service of Healing (166-173)

Distribution of Holy Communion by Lay Eucharistic Ministers to persons who are ill or infirm (322-326)

[The following may be added to the BOS as new resources:]

Blessings/Prayers for Fertility Issues

Blessing for Closure after a Miscarriage

Blessings/Prayers for Urgent OB/GYN Crises

Rite/Prayers for Healing, Health, and Wholeness

Rites for Repentance, Healing, and Forgiveness for the Sin of Racism (e.g., in regard to boarding schools that disaffected Indigenous peoples and to the Manifest Destiny that stripped them of their land)

### **Lay Ministry**

[The following BOS 2003 resource will be retained or revised:]

Commissioning for Lay Ministries in the Church (179-195)

[The following may be added to the BOS as new resources:]

Affirming/Commissioning the Baptismal Mission and Ministries of Lay Persons in the World

### **The Mission of the Church**

[The following BOS 2003 resources will be retained or revised:]

Dedication of Church Furnishings and Ornaments (196-213)

Founding of a Church

Ground Breaking (214-219)

Laying of a Cornerstone (219-220)

Discernment for a New Church Mission (222-228)

Liturgy for Commissioning a Church Planter, Missioner, or Mission Team (229-239)

Liturgy for the Opening of a New Congregation (240-243)

Setting Apart Secular Space for Sacred Use (244-245)

Litany for the Mission of the Church (245-248)

A Variety of Church Planting Collects, Blessings, and Other Prayers (249-250)

Hymn Suggestions for Church Planting Liturgies (251-253)

Spanish or French-Language Resources for Church Planting (Spanish, 255-283; French, 284-314)

Secularizing a Consecrated Building (319-321)

[The following may be added to the BOS as new resources:]

Rite for the Closing of a Church (different from Secularizing a Consecrated Building)

### **Supporting and Nurturing Christian Life and Practice**

[The following BOS 2003 resources will be retained or revised:]

Blessings for Homes:

At Epiphany or Easter (47-50, 99-102)

Celebration for a Home (146-156)

Welcoming New People to the Congregation (112)

When Members Leave a Congregation (113)

[The following may be added to the BOS as new resources:]

Blessing for Adult Education Opportunities

Celebrating the Eucharist in a Home or Living Room

Guidelines and Resources for Our Lady of Guadalupe and Other Festivals

New Year's Observances for Cultures with a Non-European Calendar

Rite(s) for Affirming Those Who Are New Members of the Church

### **Transitions, Milestones, and Urgent Occurrences in Life**

[The following BOS 2003 resources will be retained or revised:]

Anniversary of a Marriage (163-165)

Guidelines for Use on the Occasion of a Retirement or Work Transition (327-328)

[The following may be added to the BOS as new resources:]

Blessing for the Start of the School Year (similar to blessing of backpacks)

Blessing for Going Off to College  
 Blessing for Graduations  
 Blessing for Getting a Driver's Permit or License  
 Blessing for an Adult Child Who Is Leaving Home  
 Blessing for a Job Search  
 Blessing for Starting a New Job  
 Pastoral Materials for Circumstances surrounding the Incarceration of a Child (e.g., in light of the school-to-prison pipeline)  
 Pastoral Material for Reconciliation and Restoration Where There Has Been Abuse  
 Pastoral Material for Those Affected by Sexual Misconduct  
 Resources for *Quinceañeras* (young women's rite of passage into adult responsibility)  
 Response to a Community Tragedy  
 Rite for Ending a Marriage or Other Relationship  
 Return of a Parishioner after Traumatic Separation from a Congregation (e.g., imprisonment, mental hospital, military service)  
 Celebrating the Start or Completion of a Young People's Rite of Passage Program

**Other Occasional Services**

[The following BOS 2003 resources will be retained or revised:]

About Exorcism (174)  
 Restoring Things Profaned (317-318)

EPISCOPAL SERVICES

[The following BOS 2003 resources will be retained or revised:]

Consecration of Chrism Apart from Baptism (330-331)  
 Reaffirmation of Ordination Vows (333-336)  
 Service for the Ending of a Pastoral Relationship and Leave-Taking from a Congregation (338-346)  
 Recognition and Investiture of a Diocesan Bishop (348-355)  
 Welcoming and Seating of a Bishop in the Cathedral (357-359)  
 Setting Apart for a Special Vocation (360-364)

[The following may be added to the BOS as new resources:]

Receiving Vows of a Solitary  
 Renewal of Baptismal Vows as Part of Ordination or Consecration

**Note:** The following items (and perhaps more) from BOS 2003 may be discontinued as BOS resources, pending further consultation and consideration:

Anthems at the Candle Lighting [Lucernaria] (10-16)  
 Anthems at the Breaking of the Bread [Confractoria] (17-21)  
 Vigil for Christmas Eve (35)  
 Vigil for the Eve of the Baptism of Our Lord (51-52)  
 Service for All Hallows' Eve (108-110)

The Potential Size of the Revised BOS

The wide-ranging process of revising the BOS comprehensively will no doubt amass and generate a huge body of prospective resources and creative ideas — so huge that the BOS could inadvertently evolve into a multivolume publication, which could render it less handy and less portable as a resource. This abundance of worthwhile resources, however, need not become a problem, especially if some of the resources were to be redirected elsewhere, e.g., as an addition to the *Enriching Our Worship* series.

The Proposed Production Process

The BOS/EOW Subcommittee recommends the following process during the 2016-2018 triennium for advancing the comprehensive revision of the Book of Occasional Services:

- Continue requesting and collecting a broad range of recommendations and materials for the BOS revision.
- Meet with a consultant, appointed by the SCLM, who would assist the Commission in determining the scope, strategy, and timeline of the project.
- Appoint subcommittees whose task would be to find, select, organize, develop, and recommend liturgical and catechetical resources relating to their assigned topical categories. The Commission would also appoint to each subcommittee a consultant who has expertise or relevant experience in the respective categories. The recommended subcommittees and their assigned topic areas (compare the categories listed in the sample table of contents, above) would be as follows:
  1. *The Church Year* (both general and seasonal resources)
  2. *Christian Initiation and Commitment*; also, *Lay Ministry*
  3. *Dying, Death, Burial, Commemorations*
  4. *God's Created Universe*; also, *Supporting and Nurturing Christian Life and Practice*
  5. *Healing, Sickness, Well-Being*; also, *Transitions, Milestones, and Urgent Occurrences in Life*
  6. *The Mission of the Church*; *Episcopal Services*; also, *Other Occasional Services*
- With recommendations and assistance from the BOS/EOW Subcommittee, and taking into consideration the work of the six topical subcommittees, the SCLM would set the table of contents for the proposed BOS revision.
- Assign two or three writers to “flesh out” the table of contents by inserting, revising, or augmenting pre-existing materials or, as needed, writing original liturgical and catechetical resources.
- Send the completed materials to a professional editor for final development.
- Present the final work or a progress report to the SCLM at its last meeting of the triennium.

**A059: CONTINUE REVISION OF THE BOOK OF OCCASIONAL SERVICES**

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Standing Commission on Liturgy and Music to continue its work on a comprehensive revision of the Book of Occasional Services, to seek widespread input on the table of contents and scope of the revision, and to report on its progress to the 79th General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$94,200 for the implementation of this resolution.

**EXPLANATION**

The 76th General Convention directed the Standing Commission on Liturgy and Music to undertake a substantial revision of the Book of Occasional Services. The 77th General Convention directed the commission to continue the work of revision and to report its progress to the 78th General Convention.

During the past triennium, the Subcommittee tasked with this project has (1) developed criteria for the liturgical and catechetical resources of the BOS; (2) produced a working draft of the table of contents; (3) gathered substantial input for the types of resources that could be included in the BOS; (4) begun collecting materials for potential inclusion; and (5) proposed a process for the completion of this project. The budget allocation would allow six subcommittees of three to four members each to meet three times during the triennium, with additional funds available for a consultant to guide the work, and for writers or editors to assist with the revision and development of materials.

**Congregational Song Task Force (Resolution 2012-A048)**

Members: Ana Hernandez, Chair; Beau Surratt; Robert Berra; Martha Burford; Ellen Johnston; Carl MaultsBy; Sandra Montes; Mark Edward Nelson; Jeannine Otis; Christopher Putnam; Donald Schell; Ray Urwin; Jordan Ware

*Tele/Web Conference Meetings:* Jan. 9, 2013; June 3, 2014; Aug. 5, 2014; Oct. 10, 2014

The Congregational Song Task Force was created at the behest of the 77th General Convention (Resolution A048), but it was not funded. Its members serve in diverse ministries, utilize various styles of music, and represent the breadth of cultural diversity that is The Episcopal Church. After a slow start due to personnel turnover on the Standing Commission on Liturgy and Music and to a lack of funding, the Task Force met thrice as a whole by tele/web conference (Adobe Connect) meetings; and smaller groups met periodically by Google Hangout. We reflected on the responses to the Hymnal Revision Survey conducted in the previous triennium in response to Resolution 2009-B004 and discerned that the most important next steps were to:

- Complete the World Music Project, which was approved (but never funded) to address the need for affordable musical resources in Province IX and by non-European-American clergy and musicians; and to work with Church Publishing Incorporated to secure copyright permission as required and to explore the best avenues for publication.
- Create an online clearinghouse (episcopalmusic.org?) of musical resources for liturgy and parish life that reflect the cultural diversity of the Church. Videos, music, links, and stories have been collected over the course of the triennium toward this end.
- Engage with, spread the word about, and support, where possible, the church-wide resources that already exist to improve the musical skill and understanding of musicians, clergy, and congregants (Leadership Program for Musicians Serving Small Congregations, The Center for Music and Liturgy at Virginia Theological Seminary, Music That Makes Community, the Episcopal Musicians Facebook Group, various church-based music schools, etc.).
- Create a congregational survey. The Task Force is currently developing a survey to ascertain the state of congregational song and musical needs in dioceses and parishes across The Episcopal Church.
- Continue to compile musical resources reflecting the cultural diversity of the Church and make them widely available to its people.

The work of the Congregational Song Task Force has led the Standing Commission on Liturgy and Music to give renewed attention to the Leadership Program for Musicians Serving Small Congregations (LPM), a joint project of The Episcopal Church and the Evangelical Lutheran Church in America, and a 501(c)(3) corporation. The 1994 General Convention established the LPM and authorized \$27,000 for an administrator and consultants to develop and implement the program (Resolution 1994-A092). Subsequent conventions endorsed continuation of the program and authorized additional funding (Resolution 1997-A099 authorized \$99,000; and Resolutions 2000-A064, 2003-B010, 2006-A079 each authorized \$75,000), but the program has not received funding from The Episcopal Church since 2009.

An energized and empowered musical leadership requires commitment and training. Thirty percent of Episcopal congregations have fewer than 35 members, and many lack the resources needed to provide growing congregations with adequate musical leadership. The effectiveness of the LPM material has been confirmed by the more than 600 musicians who have participated, by their clergy and congregations, and by the bishops who have observed the positive changes in worship that result when musicians experience professional formation and growth. LPM has begun the transition from a two-year commitment with a six-course curriculum to a combination of workshops, distance-learning platforms, and mentors to emphasize the theological, musical, and pastoral principles that inform our church music. The continued existence of the Leadership Program for Musicians is in jeopardy without Episcopal funding.

#### A060: CONTINUE THE WORK OF THE CONGREGATIONAL SONG TASK FORCE

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention empower the Congregational Song Task Force of the Standing Commission on Liturgy and Music to further the mission of The Episcopal Church by enlivening and invigorating congregational song through the development of a variety of musical resources; and be it further



*Resolved*, That the Congregational Song Task Force of the Standing Commission on Liturgy and Music develop and expand the work begun in the World Music Project; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$72,600 for the implementation of this resolution.

EXPLANATION

The 77th General Convention directed the Standing Commission on Liturgy and Music to create the Congregational Song Task Force (Resolution A048) but did not fund it. The Congregational Song Task Force (CSTF), having met over the course of the last triennium, has discerned a need for an easily accessible website that is a clearinghouse for congregational song resources. Many of the resources needed to enliven and invigorate the Church's song already exist and need only to be curated into a useful collection and made available to the people in the pew.

In the Hymnal Revision Survey conducted in the 2010-2012 triennium, respondents in Province IX expressed an urgent need for affordable musical resources suitable for their contexts. Non-European-American clergy and musicians also expressed their desire to have culturally appropriate musical resources included in the official hymnal of the Church. The work already begun in the World Music Project was produced to fill precisely this need and was approved but never funded.

Church Publishing has generously offered use of their Music Rite Away website to the Congregational Song Task Force, which seeks funding to: collect and edit the songs from the World Music Project, along with additional congregational song resources; secure copyright permission as required; and make the resources available.

The budget allocation will provide for three face-to-face meetings of the Task Force to collect and edit the contents of the World Music Project, with additional funds to pay for typesetting, an editorial assistant's work on copyrights and permissions, and the development and maintenance of a user-friendly website of accessible resources for the whole Church.

AO61: SUPPORT LEADERSHIP PROGRAM FOR MUSICIANS

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention endorse the continuation of the Leadership Program for Musicians Serving Small Congregations (LPM), which provides musicians who serve small congregations with continuing education for musical leadership in liturgy; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$18,000 for the implementation of this resolution.

EXPLANATION

The Leadership Program for Musicians Serving Small Congregations (LPM), a joint program of The Episcopal Church and the Evangelical Lutheran Church in America (ELCA) begun in the mid-1990s, is committed to preparing capable and confident musical leaders who, working with clergy and educators, can create worship that is vibrant, participatory, and transformational.

The curriculum is being redesigned in order to provide a distance-learning platform for the appropriate parts (anything requiring skill development still needs human contact). Access to the proven instructional materials provided by the LPM will provide Episcopal musicians in even the most rural places with confidence and a solid grounding in the liturgical practices of the Church.

The Episcopal Church provided significant funding for the LPM from 1994-2009, but the past two conventions have not authorized expenditures for the program. A budget allocation of \$18,000 will support the transitional work of the LPM through the 2016-2018 triennium and will provide travel expenses for a member of the SCLM to be represented at annual LPM board meetings.

### **Addressing Christian Anti-Judaism (Resolution 2012-A058)**

*Project Chair:* Louis Weil

Resolution 2012-A058 directed the SCLM to continue its project dealing with elements of anti-Judaism in the lectionary and in the rites of the BCP. During the course of the triennium, the following items were posted to the SCLM blog (<http://liturgyandmusic.wordpress.com/category/christian-anti-judaism/>):

- an article by The Rev. Dr. Louis Weil on the need to confront expressions of anti-Judaism in the liturgy, March 2, 2013 (viewed 356 times);
- an article by The Rev. Dr. Louis Weil on anti-Jewish elements in the lectionary readings for Holy Week, March 19, 2013; republished with this was a statement issued by the Standing Liturgical Commission on February 26, 1979 on the inappropriate use of the Seder in Holy Week (viewed 465 times);
- a collection of quotations from both Jewish and Christian writers on anti-Jewish elements in the New Testament and in the liturgy, July 14, 2013 (viewed 720 times);
- an article on Christian anti-Judaism by The Rev. Susan Auchincloss offering the perspective of a parish priest as she has confronted this question, December 4, 2013 (viewed 419 times);
- a notice from the American Interfaith Institute inviting the submission of “Mindful Sermons of Holy Week,” March 7, 2014 (viewed 713 times);
- a notice from the American Interfaith Institute announcing webinars on “Jewish-Christian Dialogue: Commitment and Challenges – Latin American and International Experiences and Perspectives,” August 5, 2014 (viewed 203 times).

The Commission believes that addressing Christian anti-Judaism continues to be important for The Episcopal Church and recommends that the work continue.

#### **A062: ADDRESS CHRISTIAN ANTI-JUDAISM**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Standing Commission on Liturgy and Music to continue to collect, review, and disseminate materials to address Christian anti-Judaism expressed in and stirred by portions of Christian scriptures and liturgical texts.

#### **EXPLANATION**

This resolution asks the Standing Commission on Liturgy to continue work first directed in Resolution 2006-C001, calling for “materials to assist members of the Church to address anti-Jewish prejudice expressed in and stirred by portions of Christian scriptures and liturgical texts.”

### **Biblical Translations (Resolution 2012-A061)**

*Subcommittee Members:* Drew Nathaniel Keane, Chair; Paul Carmona; Steven Miller

*Tele/Web Conference Meeting:* Apr. 12, 2013

In response to the 77th General Convention Resolution A061, which was referred to the SCLM, the Biblical Translations Subcommittee prepared “Criteria for Recommending New Biblical Translations for Use in Public Worship.” Hitherto, this canon has provided a list of translations approved for use in public worship without indicating how translations are to be evaluated. This lack of clarity invites unnecessary confusion, which the Subcommittee believes may be addressed through a clearly articulated set of standards for evaluating translations of the scriptures proposed for inclusion in Canon II.2 as well as by a clearly articulated process for such evaluation.

After the Subcommittee prepared a list of criteria, a draft was shared with 25 scholars in The Episcopal Church. Responses were received from Garwood P. Anderson, Steven Bishop, Cynthia Briggs Kittredge, Christopher Bryan, Stephen L. Cook, Gavin Dunbar, Hemchand Gossai, Wesley Hill, Paul A. Holloway, and Carolyn Sharp. These responses were carefully considered by the Biblical Translations Subcommittee in order to revise and refine the Criteria.

Once the Criteria were finalized by the Subcommittee and approved by the Commission, a resolution to amend Canon II.2 was developed in consultation with the Standing Commission on Constitution and Canons. The proposed revision to Canon II.2 establishes a process by which translations of the Bible are to be carefully evaluated by the Standing Commission on Liturgy and Music using the Criteria for Recommending New Biblical Translations for Use in Public Worship; only translations that can be shown to conform to these standards may be considered for inclusion in the list of approved biblical translations provided by Canon II.2.

A063: ADOPT CRITERIA FOR BIBLICAL TRANSLATIONS AND AMEND CANON II.2

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention adopt the following Criteria for Recommending New Biblical Translations for Use in Public Worship:

I. Guiding assumptions:

1. There is no perfect translation. It is impossible to render the full meaning of a text in its original language and context into another language and context.
2. All translations make interpretive choices; there is no “neutral” translation. However, some translations conform more closely than others to the specific criteria listed below.
3. The goal of these criteria is not to advance any particular interpretations; but, rather, to help ensure that amendments to Canon II.2 will be generally received as reasonable, responsible, and suitable.
4. Ordinarily, for a translation to be considered, it must include the books of the Old and New Testament and the Apocrypha or Deuterocanonical Books as listed in the Articles of Religion.
5. No translation will be universally received as fully meeting all of these criteria. To be recommended, a new translation should be widely received as meeting most of these specific criteria.

II. To be recommended for use in public worship, a translation should meet the specific criteria of being:

1. Based on academically or historically accepted editions of the Hebrew and Greek texts;
2. Technically competent in approximating the meaning of the base text;
3. Comprehensible to the target audience;
4. Fluid when spoken aloud;
5. Stylistically suitable to approved services.

III. While some translations obviously fail to meet these standards, measuring a text by these criteria is far from an exact science. We can, however, look for certain kinds of positive reception to indicate whether or not a text meets most of these criteria:

1. Academic reception. Do most biblical scholars recognize the translation as technically competent and comprehensible to the target audience? Do most liturgical scholars recognize the translation as fluid when spoken aloud and stylistically suitable to approved services?
2. Pastoral reception. Does a significant number of clergy consider the translation comprehensible to their congregations, fluid when spoken aloud, and/or stylistically suitable for their services?
3. Anglican reception. Have most other Churches in the Anglican Communion made provision for the use of the translation in public worship?

4. Full Communion Partners' reception. Have most of The Episcopal Church's Full Communion Partners made provision for the use of the translation in public worship?
5. Ecumenical reception. Have other Churches made provisions for the use of the translation in public worship?;

and be it further

Resolved, That Canon II.2 is hereby amended by adding two new sections:

Canon 2: Of Translations of the Bible

Sec. 1. The Lessons prescribed in the Book of Common Prayer shall be read from the translation of the Holy Scriptures commonly known as the King James or Authorized Version (which is the historic Bible of this Church) together with the Marginal Readings authorized for use by the General Convention of 1901; or from one of the three translations known as Revised Versions, including the English Revision of 1881, the American Revision of 1901, and the Revised Standard Version of 1952; from the Jerusalem Bible of 1966; from the New English Bible with the Apocrypha of 1970; or from The 1976 Good News Bible (Today's English Version); or from The New American Bible (1970); or from The Revised Standard Version, an Ecumenical Edition, commonly known as the "R.S.V. Common Bible" (1973); or from The New International Version (1978); or from The New Jerusalem Bible (1987); or from the Revised English Bible (1989); or from the New Revised Standard Version (1990); or from the Contemporary English Version (1995); or from the Contemporary English Version Global (2005); or from the Common English Bible (2011); or from translations, authorized by the diocesan bishop, of those approved versions published in any other language; or from other versions of the Bible, including those in languages other than English, which shall be authorized by diocesan bishops for specific use in congregations or ministries within their dioceses.

*Sec. 2. All translations proposed for inclusion in Canon II.2.1 must conform to the Criteria for Recommending New Biblical Translations for Use in Public Worship adopted by General Convention.*

*Sec. 3. All translations proposed for inclusion in Canon II.2.1 must first be referred to the Standing Commission on Liturgy and Music for review according to the Criteria for Recommending New Biblical Translations for Use in Public Worship.*

EXPLANATION

In response to General Convention Resolution 2012-A061 to amend Canon II.2, the Standing Commission on Liturgy and Music has prepared "Criteria for Recommending New Biblical Translations for Use in Public Worship" and also recommends this amendment to Canon II.2. Hitherto, this canon has provided a list of translations approved for use in public worship; it has not, however, indicated the standards by which these translations are evaluated. This lack of clarity invites unnecessary confusion, which may be addressed by amending the canon to reference the "Criteria for Recommending New Biblical Translations for Use in Public Worship" and by articulating a process through which translations may be carefully evaluated.

### Publication of Liturgical Resources

The 2012 General Convention authorized the provisional use of “The Witnessing and Blessing of a Lifelong Covenant” beginning the First Sunday of Advent 2012. However, no steps could be taken to publish the material until new Commission members were appointed and the Commission was organized for the 2013-2015 triennium. The delay made it difficult to implement the resolution as intended.

During the triennium, SCLM members Ruth Meyers and Thomas Ely consulted with Michael Barlowe, Secretary of General Convention; and with Thomas Little, Chair of the Standing Commission on the Structure of the Church, to find a more expeditious way to manage the publication of liturgical resources authorized by General Convention. This working group concluded that two changes to the canons would establish a smoother process: 1) including among the responsibilities of the Standing Commission on Liturgy and Music collaboration with the Secretary of General Convention in final editing and arranging for publication of liturgical materials authorized by General Convention; and 2) allowing members of the SCLM to remain in office until their successors take office in order to fulfill this responsibility.

#### A064: AMEND CANON I.1.2(N)(6)

Resolved, the House of \_\_\_\_\_ concurring, That Canon I.1.2(n)(6) is hereby amended to read as follows:

(6) A Standing Commission on Liturgy and Music. The Custodian of the Book of Common Prayer shall be a member *ex officio* with voice, but without vote. It shall be the duty of the Commission to:

- (i) Discharge such duties as shall be assigned to it by the General Convention as to policies and strategies concerning the common worship of this Church.
- (ii) Collect, collate, and catalogue material bearing upon possible future revisions of the Book of Common Prayer.
- (iii) Cause to be prepared and to present to the General Convention recommendations concerning the Lectionary, Psalter, and offices for special occasions as authorized or directed by the General Convention or House of Bishops.
- (iv) Recommend to the General Convention authorized translations of the Holy Scripture from which the Lessons prescribed in the Book of Common Prayer are to be read.
- (v) Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.
- (vi) Collect, collate, and catalogue material bearing upon possible future revisions of The Hymnal 1982 and other musical publications regularly in use in this Church and encourage the composition of new musical materials.
- (vii) Cause to be prepared and present to the General Convention recommendations concerning the musical settings of liturgical texts and rubrics, and norms as to liturgical music and the manner of its rendition.
- (viii) At the direction of the General Convention, to serve the Church in matters pertaining to policies and strategies concerning Church music.
- (ix) *Collaborate with the Secretary of General Convention to make final edits to the text of resolutions adopted by General Convention and that establish new or revised liturgical materials, and to arrange for their publication. For the sole purpose of this collaboration, members of the Standing Commission on Liturgy and Music are exempt from the terms of office set forth in I.1.2(b) and shall remain in office until their successors are appointed and take office.*

#### EXPLANATION

This canonical change would facilitate sooner certification, publication, and use of new or revised liturgical materials following adjournment of the General Convention at which the materials were adopted. Currently, the process must wait for the appointment of new members of the Standing Commission on Liturgy and

Music and for the organization of that Commission, which typically occur in November or December after General Convention. The proposed changes to the canons would make it possible to publish the new or revised materials sooner than that.

**Discerning Future Work**

*Subcommittee Members:* Steven Miller, Convener; Paul Carmona; Amy Chambers Cortwright; Gregory Howe, Custodian of the Book of Common Prayer; Ruth Meyers; William Petersen; John “Kee” Sloan

*Tele/Web Conference Meeting:* March 31, 2014

During the triennium, the Commission began to discuss whether or not it was time to consider beginning the process that would ultimately result in the adoption of a revised Book of Common Prayer. We were led to this discussion by a number of factors, notably the wide range of local revision and experimentation and the fact that many of the member churches of the Anglican Communion whose revisions were influenced by BCP 1979 are in the process of revising their prayer books. It was also noted that issues surrounding gender and God-language were part of the work remaining from BCP 1979. This issue alone has shaped much of the local revision and experimentation.

A subcommittee was created to discuss this matter further. Members identified a number of matters to consider — for example, understandings of confirmation and of marriage; who may receive communion; inculturation; the structure of the Daily Office, a non-eucharistic service for Sunday morning; and whether to retain rites both in contemporary English (Rite II) and in Tudor English (Rite I).

A subcommittee was created to discuss this matter further. Members identified a number of matters to consider — for example, understandings of confirmation and of marriage; who may receive communion; inculturation; the structure of the Daily Office, a non-eucharistic service for Sunday morning; and whether to retain rites both in contemporary English (Rite II) and in Tudor English (Rite I).

The Commission determined that during the next triennium it would begin to prepare a liturgical resource that will address issues of Christian initiation so that any revision of the Book of Common Prayer would incorporate recent scholarship and ecumenical consensus regarding baptism, confirmation, and admission to Holy Communion.

**AO65: DEVELOP LITURGICAL RESOURCE ON CHRISTIAN INITIATION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Standing Commission on Liturgy and Music to develop a liturgical resource on Christian initiation; and be it further,

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$24,800 for the implementation of this resolution.

**EXPLANATION**

During the past decade, the General Convention has considered resolutions on both confirmation and admission to communion, and the Theology Committee of the House of Bishops has produced essays on both topics. Yet these matters have not been considered in relation to each other. A liturgical resource on Christian initiation would consider both topics as part of a broader review of the theology of baptism in the 1979 BCP, in light of recent ecumenical scholarship. A liturgical resource would provide the groundwork for future revision of the Book of Common Prayer. The budget allocation would allow a subcommittee of six members to meet three times during the triennium, with additional funds available for a consultant to guide the theological work.

**AO66: AMEND ARTICLE X OF THE CONSTITUTION: THE BOOK OF COMMON PRAYER [FIRST READING]**

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

The Book of Common Prayer, as now established or hereafter amended by the authority of this Church, shall be in use in all the Dioceses of this Church. No alteration thereof or addition thereto shall be made unless the same shall be first proposed in one regular meeting of the General Convention and by a resolve thereof be sent within six months to the Secretary of the Convention of every Diocese, to be made known to the Diocesan Convention at its next meeting, and be adopted by the General Convention at its next succeeding regular meeting by a majority of all Bishops, excluding retired Bishops not present, of the whole number of Bishops entitled to vote in the House of Bishops, and by a vote by orders in the House of Deputies in accordance with Article I, Sec. 5, except that concurrence by the orders shall require the affirmative vote in each order by a majority of the Dioceses entitled to representation in the House of Deputies.

But notwithstanding anything herein above contained, the General Convention may at any one meeting, by a majority of the whole number of the Bishops entitled to vote in the House of Bishops, and by a majority of the Clerical and Lay Deputies of all the Dioceses entitled to representation in the House of Deputies, voting by orders as previously set forth in this Article:

- a) Amend the Table of Lessons and all Tables and Rubrics relating to the Psalms.
- b) Authorize for trial use throughout this Church, as an alternative at any time or times to the established Book of Common Prayer or to any section or Office thereof, a proposed revision of the whole Book or of any portion thereof, duly undertaken by the General Convention.
- c) *Provide for use of other forms for the renewal and enrichment of the common worship of this Church for such periods of time and upon such terms and conditions as the General Convention may provide.*

And Provided, that nothing in this Article shall be construed as restricting the authority of the Bishops of this Church to take such order as may be permitted by the Rubrics of the Book of Common Prayer or by the Canons of the General Convention for the use of special forms of worship.

**EXPLANATION**

The Constitution allows the General Convention to authorize alternative forms of worship only for trial use as a proposed revision of the Book of Common Prayer. Since the 1979 Book of Common Prayer was adopted, alternative forms of worship in the Enriching Our Worship series and in Liturgical Resources 1 have been authorized, even though these were not designated for trial use as a proposed revision of the BCP.

In addition, a number of congregations are experimenting with other new liturgical forms. This amendment would create a clear, constitutional basis for experimental liturgical reforms that are not intended for trial use as a proposed revision of the Book of Common Prayer, while ensuring common prayer through the use of authorized liturgical materials.

**Other Referred Resolutions**

*Revised Common Lectionary (Resolution 2012-A059)*

**AO67: REVISE BOOK OF COMMON PRAYER FOR REVISED COMMON LECTIONARY [SECOND READING]**

Resolved, the House of \_\_\_\_\_ concurring, That the Standard Book of Common Prayer shall be revised as follows:

p.271: Palm Sunday, Liturgy of the Palms

Year A: Matthew 21:1-11

Year B: ~~Mark 11:1-11a~~ Mark 11:1-11, or John 12:12-16

Year C: ~~Luke 19:29-40~~ Luke 19:28-40

p. 272: Palm Sunday, at the Eucharist

Old Testament: ~~Isaiah 45:21-25, or Isaiah 52:13-53:12~~ Isaiah 50:4-9a

Psalm: ~~22:1-21, or 22:1-41~~ 31:9-16

Epistle: Philippians 2:5-11

p. 273: Palm Sunday, at the Eucharist

Year A: ~~Matthew 26:36-27:54(55-66) or 27:1-54(55-66)~~ Matthew 26:14-27:66, or 27:11-54

Year B: ~~Mark 14:32-15:39(40-47)~~ Mark 14:1-15:47, or 15:1-39 (40-47)

Year C: ~~Luke 22:39-23:49(50-56),~~ Luke 22:14-23:56, or 23:1-49 (50-56)

p. 274: Maundy Thursday

Old Testament: ~~Exodus 12:1-14a~~ Exodus 12:1-4(5-10) 11-14

Psalm: ~~78:14-20,23-25~~ 116:1,10-17 (omit Hallelujah in verse 17)

Epistle: 1 Corinthians 11:23-26 (~~27-32~~)

Gospel: ~~John 13:1-15, or Luke 22:14-30~~ John 13:1-17, 31b-35

p. 276: Good Friday

Old Testament: ~~Isaiah 52:13-53:12, or Genesis 22:1-18, or Wisdom 2:1,12-24~~

Psalm: ~~22:1-11(12-21), or 40:1-14, or 69:1-23~~

Epistle: ~~Hebrews 10:1-25~~ Hebrews 10:16-25, or 4:14-16; 5:7-9

p. 277: Good Friday

~~John 18:1-19:37, or 19:1-37~~ John 18:1-19:42

p. 283: Holy Saturday

Old Testament: Job 14:1-14, or Lamentations 3:1-9,19-24

Psalm: ~~130, or 31:1-5~~ 31:1-4,15-16

Epistle: I Peter 4:1-8

Gospel: Matthew 27:57-66, or John 19:38-42

pp. 288-295: The Great Vigil of Easter:

p. 288: The story of Creation

Genesis ~~1:1-2:2~~ Genesis 1:1-2:4a

Psalm ~~33:1-11, or Psalm 36:5-10~~ 136:1-9,23-26

p. 288: The Flood

Genesis 7:1-5, 11-18; 8:6-18; 9:8-13

Psalm 46



p. 289: Abraham's Sacrifice of Isaac  
 Genesis 22:1-18  
~~Psalm 33:12-22, or Psalm 16~~

p. 289: Israel's Deliverance at the Red Sea  
~~Exodus 14:10-15:1~~ Exodus 14:10-31; 15:20-21  
 Canticle 8, The Song of Moses

p. 290: God's Presence in a Renewed Israel  
~~Isaiah 4:2-6~~ Baruch 3:9-15, 32-4:4, or Proverbs 8:1-8, 19-21; 9:4b-6  
~~Psalm 122~~ Psalm 19

p. 290: Salvation Offered Freely to All  
 Isaiah 55:1-11  
 Canticle 9, The First Song of Isaiah, ~~or Psalm 42:1-7~~

p. 290: A New Heart and a New Spirit  
 Ezekiel 36:24-28  
~~Psalm 42:1-7, or Canticle 9, The First Song of Isaiah~~ Psalms 42 and 43

p. 291: The Valley of Dry Bones  
 Ezekiel 37:1-14  
~~Psalm 30, or Psalm 143~~

p. 291: The Gathering of God's People  
~~Zephaniah 3:12-20~~ Zephaniah 3:14-20  
~~Psalm 98, or Psalm 126~~

p. 295: At the Eucharist  
 Gospel: Year A Matthew 28:1-10  
           Year B: Mark 16:1-8  
           Year C: Luke 24:1-12

EXPLANATION

This revision was adopted by the previous General Convention in Resolution 2012-A059. Article X of the Constitution requires that revisions to the Book of Common Prayer are proposed in one regular meeting of General Convention, published to the Diocesan Conventions, and adopted at the next succeeding regular meeting of General Convention by a vote by orders. Having completed the first two steps in this process, this revision is now presented to the 78th General Convention for final adoption. The explanation from the original resolution filing stated:

“General Convention Resolution 2006-A077 resolved that ‘the Revised Common Lectionary shall be the Lectionary of this Church, amending the Lectionary on pp. 889-921 of the Book of Common Prayer.’ While

the Revised Common Lectionary made no changes to Ash Wednesday, there are changes in the lectionary passages for each of the Holy Week liturgies and for the Easter Vigil. The section of ‘Proper Liturgies for Special Days’ (pp. 264-295) includes the passages appointed for these days. As a result, the internal pages of the Book of Common Prayer are no longer consistent with the Lectionary. This resolution brings pages 264-295 of the BCP into conformity with the current Lectionary of The Episcopal Church.”

**Electronic Publication of Resources (Resolutions 2012-Do60 and Do79)**

*Subcommittee Members:* Derek Olsen, John Repulski, Co-chairs; Chris Cunningham

*Liaison with Church Publishing Incorporated:* Nancy Bryan; Davis Perkins

Two resolutions concerning the electronic publication of liturgical materials were referred to the Standing Commission on Liturgy and Music from the 77th General Convention, 2012-Do60 and 2012-Do79. The key concern at the heart of both of these resolutions revolved around making liturgical materials approved for use by General Convention freely available in a platform-neutral format.

In response to these resolutions and other external factors, a new process has been put into place regarding the publication of authorized materials. Formerly, the copyrights of liturgical material had been held by Church Publishing Incorporated and the Church Pension Group. This has now changed; going forward, the copyrights will be held by the General Convention Office.

Going forward, Church Publishing will be producing digital editions of liturgical material authorized by General Convention in the platform-neutral PDF format. These will be offered as a free download from The Episcopal Church’s main website. Currently, the Book of Common Prayer and all 5 volumes of Enriching Our Worship are available for free download.

*Liturgies for Adoption of Children (Resolution 2012-A060)*

The Commission began work on liturgical materials addressing pastoral issues in the context of adoption of children in response to General Convention Resolution 2006-A070. In the ensuing triennia, the Commission began articulating theological principles and drafting liturgical materials. During this triennium, the Commission had insufficient resources, both human and financial, to make any progress, given all of the other work referred to it by the General Convention.

**Reports**

*Report of the Custodian of the Book of Common Prayer*

Once again I wish to thank the Presiding Bishop for allowing me to continue in one of the most rewarding offices in the Church. I would also like to thank The Rev. Ruth Meyers for her leadership. I have cooperated with the SCLM as requested. Since this will be my last report to General Convention, I hope that you will consider several important missional opportunities. The recent revision of Title II, Canon 3, Sec. 5 make possible a significant change to the certified French and Spanish versions of the Book of Common Prayer. It is now possible to have original French and Spanish versions with English translations. Our previous policy of literal translations from English suggests an unconscious neo-colonialism. French and Spanish Episcopalians can now worship in their own idioms and cultures (“And how is it that we hear, each of us, in our own native language?” [Acts 2:8]). Similar work in Creole and Portuguese would be very useful in parts of our country. The Churches in Brazil and Haiti would probably be happy to assist us.

Respectfully submitted,  
 The Rev. Canon Gregory M. Howe  
 Custodian of the Standard Book of Common Prayer

## A068: TRANSLATE PORTIONS OF BOOK OF COMMON PRAYER

Resolved, the House of \_\_\_\_\_ concurring, That the Standing Commission on Liturgy and Music, in cooperation with the Custodian of the Book of Common Prayer, be directed to begin work on translation of portions of the Book of Common Prayer into French, Creole, and Spanish, according to the principles outlined in Canon II.3.5, and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$40,000 for the implementation of this resolution; \$20,000 to be allocated for work on French and Creole translations; and \$20,000 for work on Spanish translations.

## EXPLANATION

Throughout our history, translations from the Standard Book of Common Prayer have been literal translations on the formal equivalence model. The revision of Canon II.3.5 at the 77th General Convention permits a degree of idiomatic freedom in the direction of dynamic equivalence.

Our current official texts in French and Spanish are more than 30 years old and do not reflect current liturgical usage in French and Spanish. There is no Standard Creole text; the French text would be used widely throughout Francophone Africa and Oceania as well as in Europe. This proposal represents a major opportunity for inculturation and evangelism for a multicultural Church.

The budget allocation would allow two teams of four translators each to meet once during the triennium, with additional funds available for translators, writers, and editors to support the commission's work.

*Report of the Liaison to the Consultation on Common Texts*

**I. Membership & Mission.** A complete list of more than 20 churches in the United States and Canada officially represented on CCT can be found at <http://www.commontexts.org> (the Conference of Catholic Bishops in both countries also sends representatives to CCT). CCT is the publisher of the *Revised Common Lectionary* (RCL) and continues to work on common texts for worship.

**II. Annual Reports.** Representatives generally are liaisons with national groups or agencies having liturgical responsibilities in their respective churches. At the April 7-8, 2014 CCT meeting at the Interchurch Center in NYC, I reported as TEC's representative and SLCM's liaison. Particularly noted in that report were SCLM's continued work: (1) on BCP idiomatic Spanish and French translations; (2) the calendar of commemorations; (3) assessing the impact of TEC's GC 2012 drawback on its commitment to the RCL (Resolution 2012-Bo09); (4) same-sex blessings; and (5) new offerings such as *Daily Prayer for All Seasons*. Also reported as of general interest was TEC's restructuring initiative currently reaching proposal stage.

**III. CCT's Continuing Work.** The RCL continues to expand its range of reception in churches and traditions beyond North America. This has occurred to the point where we have launched plans for a global survey of its usage. For increasing reception in North America, CCT is preparing for various media more popular (rather than scholarly) introductions to the RCL.

CCT also relates to, and is officially represented at, the biennial meeting of the English Language Liturgical Consultation (ELLC). ELLC (<http://www.englishtexts.org>) is an international and ecumenical body that develops and proposes a broad range of common liturgical texts. As it happens, I have served (along with a Canadian delegate) to represent CCT to ELLC since 2011. In contradistinction to some trends, ELLC's "Reims Statement: Praying with One Voice" (2011; <http://englishtexts.org/RecentWork/TheReimsStatement/tabid/913/Default.aspx>) is instructive and encouraging in regard to common lectionaries and other common liturgical texts. The ELLC will meet again in August 2015 in conjunction with Societas Liturgica.

**IV. Annual CCT Forum.** In recent years, CCT has devoted the first day of its annual meeting to a forum open to the wider church-related public in whatever venue it is meeting. In 2012 (NYC), the subject was the observance of an expanded Advent as congruent with the RCL; 2013 (Toronto) featured a focus on indigenization of the lectionary for “first nations.” On April 7, 2014, the forum centered on questions of potential or actual Christian anti-Judaism in the RCL, especially regarding texts for Holy Week and Good Friday. Through the good offices of the American Interfaith Institute’s webcast of the event, this forum in fact reached a far broader audience than just clergy and laity from the greater NYC metropolitan area. Besides the webcast (archived at <http://www.aif.org>), the Institute also posted from a global and ecumenical pool seven Good Friday sermons considered exemplary in confronting anti-Judaism. I was honored to find my own among the seven selected. All of this is a tribute to our own SCLM as it originally called on CCT to address the questions of Christian anti-Judaism. As a result, future CCT work may include new translations of problematic texts.

Respectfully submitted,  
The Very Rev. William H. Petersen  
TEC Liaison to the Consultation on Common Texts

*International Anglican Liturgical Consultation*

The International Anglican Liturgical Consultation (IALC) meets every two years in conjunction with Societas Liturgica, the international and ecumenical academy of liturgical scholars. Serving as the official Anglican Communion network for liturgy, IALC participants include those whom provinces of the Communion nominate and send, Anglican members of Societas Liturgica, and members of provincial liturgical commissions.

Participation in the IALC is an important opportunity for members of the SCLM to learn about liturgical developments in other parts of the Communion and to hear responses to liturgical developments in The Episcopal Church. SCLM members Steven Miller and Ruth Meyers represented The Episcopal Church when the IALC met in Dublin, Ireland in August 2013. In addition to presenting our work on same-sex blessings, we learned of work underway on Prayer Book revision in other provinces, and participated in the consultation’s consideration of rites of healing and reconciliation.

**A069: AFFIRM PARTICIPATION IN IALC**

Resolved, the House of \_\_\_\_\_ concurring, That the General Convention affirm the participation of The Episcopal Church in the International Anglican Liturgical Consultation; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$4,000 for the implementation of this resolution.

**EXPLANATION**

Participation in the International Anglican Liturgical Consultation (IALC), the official Anglican Communion network for liturgy, enables the Standing Commission on Liturgy and Music to learn firsthand of liturgical developments in other parts of the communion and to consult with leaders from around the Communion about liturgy in The Episcopal Church.

As the work of liturgical renewal continues in The Episcopal Church, principles and guidelines from IALC will help inform the work of the SCLM and so strengthen our common prayer. The IALC will likely meet once in the 2016-2018 triennium; the budget will support international travel, accommodations, and meeting expenses for one representative from The Episcopal Church.

## Budget

The Executive Council provided a budget allocation of \$35,000 for the SCLM for the 2013-2015 triennium. As of November 30, 2014, the Commission had spent \$30,242.26: \$29,392.26 for two face-to-face meetings; and \$850 for Adobe Connect licenses for tele/web conferences. Of the remaining \$4757.74, the Commission anticipated an additional \$425 for an Adobe Connect license for 2015 and up to \$2,000 for a professional editor to copyedit the resources appended to this report. The General Convention Office also anticipated some additional expenses for the October 2014 meeting.

The Standing Commission on Liturgy and Music plans to meet face-to-face approximately four times during the next triennium, with additional tele/webconferences using Adobe Connect. This will require \$29,025 for 2016, \$29,025 for 2017, and \$14,750 for 2018 (an organizational meeting for the following triennium), for a total of \$72,800 for the triennium.

## Appendices

The following appendices will be available in Spring 2015 in a separate Supplemental Materials file on the General Convention's Blue Book Reports web page (<http://www.generalconvention.org/home/bluebook>).

- Liturgical Resources 1: I Will Bless You and You Will Be a Blessing (revised and expanded)
- Revised Collects for Commemorations
- A Great Cloud of Witnesses
- Weekday Eucharistic Propers 2015
- Liturgical Materials Honoring God in Creation

# STANDING COMMISSION ON MINISTRY DEVELOPMENT

## Membership

Mr. Keane Akao, *Chair*, 2018  
The Rt. Rev. Brian Thom, *Co-Chair*, 2015  
Ms. Natalie Vanatta, *Secretary*, 2018  
The Rev. Simon Bautista, 2018  
The Rt. Rev. Mary Glasspool, 2018  
The Very Rev. Gary Hall, 2015  
Dr. Julie Lytle, 2015  
Canon Jill Mathis, 2015  
Ms. Debbie Melnyk, 2018  
Mr. Jay Phillippi, 2015  
The Very Rev. Tony Pompa, 2018  
The Rt. Rev. Rayford Ray, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. Dr. Molly James, *Representative of the President of the House of Deputies*  
Dr. Fredrica Harris Thompsett, *Executive Council Liaison*  
Ms. RuthAnn Collins, *Staff*  
The Rev. Shannon Kelly, *Staff*

The Standing Commission on Ministry Development gratefully acknowledges the assistance of the following individuals during the course of this triennium: Ms. Janie Stevens, The Rev. Dr. Ruth Meyers, Dr. Lisa Kimball, and Ms. Sharon Ely Pearson; as well as from Episcopal Church Center support staff: Ms. RuthAnn Collins, Ms. Bronwyn Skov, The Rev. Shannon Kelly, and The Rev. Anthony Guillen.

### *Representation at Convention*

Bishop Brian Thom and The Rev. Dr. Molly F. James are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** CANON I.1.2(n) (7) A Standing Commission on Ministry Development specifies that it shall be the duty of the Commission to recommend policies and strategies to the General Convention for the affirmation, development, and exercise of ministry by all baptized persons (lay persons, bishops, priests, and deacons); (ii) to recommend strategies to General Convention for the development and support of networks of individuals, diocesan Committees and commissions, agencies, and institutions engaged in recruitment, gifts discernment, education and training for ministry, leadership development, and deployment; (iii) to study the needs and trends of theological education for all baptized persons, including seminary education and lifelong learning; and to recommend strategies to General Convention to strengthen theological education for all baptized persons.

**Meetings:** The full SCMD met in person St. Louis in November 2012, and a small working group of the SCMD met in New York in November 2014 to create the Blue Book report. In the intervening two years, 26 online meetings were held of the full SCMD and its subcommittees via Adobe Connect.

**Grants:** A subcommittee of the SCMD completed the distribution of Conant Grants.

**Referred Resolutions:** Resolutions A042, A043, and A044 became the platform for our resolution about confirmation as a unique opportunity for Christian Formation. A067 was studied, which informed various aspects of competencies and maps resolutions outlined below. A076: a SCMD member participated in the Symposium for Small Church Leadership convened by the Standing Commission for Small Congregations. The reality that 58% of small congregations have fewer than 76 persons also informs the work of the SCMD. A142 was referred to Constitutions and Canons in light of its particularly canonical focus and its similarity to other resolutions that had also been referred to C&C.

**Goals and Objectives of Future Work:** The SCMD identifies the following areas as priorities for the work of The Episcopal Church in the area of Ministry Development in the next triennium:

- Preparation of a report based on findings of proposed resolutions that seeks to align the canons about confirmation with baptismal ecclesiology
- Creation of official Episcopal adaptation of the Theological Education for the Anglican Communion (TEAC) grids
- Collection of best practices for assessment and competencies in the formation of those preparing for ordained ministry
- Increased support of ethnic ministries
- Additional support for, and nurturing of, the increasingly diverse and local programs for theological education for all of the baptized

**PROPOSED RESOLUTIONS**

A080: AFFIRM CONFIRMATION AS FORMATION

*Resolved*, the House of \_\_\_\_\_ concurring, recognizing that confirmation offers a distinct and valuable opportunity for Christian formation, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$43,500 to the Office of Formation and Congregational Development to convene representatives from 10 dioceses, including a bishop and two appointed leaders, to engage in intentional conversation with the goal of strengthening and articulating best practices around confirmation; and be it further

*Resolved*, That these gatherings address the significance of confirmation as a creative opportunity for the reaffirmation of baptismal vows in the life of The Episcopal Church and report back to the 79th General Convention; and be it further

*Resolved*, That all dioceses engage in similar conversations on confirmation with attention to diverse cultures and their contexts, and report back to the Office of Formation and Congregational Development on their findings.

**EXPLANATION**

As stated in the Book of Common Prayer [p.412], “In the course of their Christian development, those baptized at an early age are expected, when they are ready and have been duly prepared, to make a mature public affirmation of their faith and commitment to the responsibilities of their Baptism and to receive the laying on of hands by the bishop.”

Additionally, the second Mark of Mission calls us to teach, baptize, and nurture people in their journey of faith. Confirmation is an important step in that journey for youth and adults.

Among Christian traditions, the Episcopal Church recognizes a unique role of bishops in confirmation. The bishops on this Standing Commission have led us in deep conversation about confirmation and encourage the House of Bishops to continue the dialogue.

The following resources are commended to promote conversation on confirmation, including *Signed, Sealed, Delivered: Theologies of Confirmation for the 21st Century* (Morehouse Publishing, 2014), which includes a process for congregational conversation about confirmation — the Lillyfunded ecumenical study on youth confirmation called The Confirmation Project (<http://www.theconfirmationproject.com>), as well as Episcopal resources from dioceses, schools, and congregations.

**A081: COMMEND USE OF THE TEAC MINISTRY GRIDS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Theological Education for the Anglican Communion (TEAC) Ministry Grids, modified as needed for the Episcopal Church, provide an excellent framework for outlining ministry competencies for all four orders. Given the rapidly changing cultural landscape and contexts for ministry, these grids are commended to all dioceses as instruments for guiding the ongoing formation of leaders in the Church; and be it further

*Resolved*, That given the variety of models of formation being developed across The Episcopal Church, the Standing Commission on Ministry Development also commends these grids as a framework for effective assessment of those preparing for ordination.

**EXPLANATION**

The TEAC grids can provide a common framework for the diverse methods of providing theological education across The Episcopal Church. Given the rising use of “outcomes-based” education, these grids provide an opportunity for the Church to engage multidimensional methods of assessment.

The Standing Commission on Ministry of Development advocates a portfolio approach to assessment using the TEAC Ministry Grids (<http://www.anglicancommunion.org/mission/theology/educationstudies/ministry-grids.aspx>) as the measuring device.

**A082: PROVIDE THEOLOGICAL EDUCATION FOR LATINO/HISPANIC MINISTRIES**

*Resolved*, the House of \_\_\_\_\_ concurring, That given the changing demographics in the United States, there is an increased need to provide theological education programs for lay and ordained leaders in Latino/Hispanic ministries; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation \$100,000 to the Office of Latino/Hispanic Ministries to develop and implement bilingual Episcopal theological education programs for the implementation of this resolution; and be it further

*Resolved*, That the Office of Latino/Hispanic Ministries also create programs to provide enculturation and cultural competency for all leaders across The Episcopal Church.

**EXPLANATION**

The fastest-growing demographic in the United States and in The Episcopal Church is Latino/Hispanic. Quality resources are being developed for the theological education of lay and clergy leaders. Funding and collaborative partners are urgently needed to adapt and implement them in Episcopal contexts to meet growing demand. Existing formation programs include:

- Instituto Episcopal de Liderazgo (<http://www.liderazgoepiscopal.com>)
- Academia Ecu mica de Liderazgo (<http://waytolead.org/ecumenical-leadership-academy-academia-ecumenica-de-liderazgo/>)



- ETEEM: Episcopal Theological Education for Emerging Ministries (<http://episcopaldigitalnetwork.com/ens/2012/06/26/seminary-of-the-southwest-launches-program-for-hispanic-students>)
- Iona Initiative (<http://www.epicenter.org/mf-formation-the-iona-center/>)
- Bishops' Native Collaborative (<http://www.bishopsnativecollaborative.com/>)

**A083: CREATE MAP OF EPISCOPAL THEOLOGICAL EDUCATION PROVIDERS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Office of Formation and Congregational Development, in collaboration with the Office of Communications, are strongly urged to create an interactive map of theological schools, seminaries, and diocesan and regional programs, including programs for ethnic and emerging ministries, involved in the formation and training of leaders in The Episcopal Church; and be it further

*Resolved*, That each program on the map be strongly encouraged to maintain its information, so that all those engaged in the formation of leaders are able to network, share best practices, and collaborate.

**EXPLANATION**

There is an increased development of local schools for ministry and a proliferation of new programs offered at Episcopal seminaries. At present there is no central database of these resources. This map can be modeled after “Find a Church” (<http://www.episcopalchurch.org/find-a-church>) or after “Find a Campus Ministry” (<http://www.episcopalchurch.org/page/campus-young-adult-ministries>) — maps that already exist to identify ministries and their locations across The Episcopal Church.

A searchable map that identifies the features of each location will facilitate communication and collaboration for theological education, particularly regarding competency and assessment. Networking and increased visibility will also provide people across The Episcopal Church with access to a broad range of theological education resources for formation.

*Additional support of Resolutions proposed by SCLCFE*

The SCMD endorses the following resolutions proposed by the Standing Commission on Lifelong Christian Formation and Education:

1. Awareness of Online Christian Formation Resources
2. Recommend Membership in Forma

## Budget

The Standing Commission on Ministry Development plans to meet approximately three times in person and regularly electronically during the next triennium. This will require \$13,000 for 2016, \$13,000 for 2017, and \$13,000 for 2018, for a total of \$39,000 for the triennium, assuming a membership of 12, a cost of \$1000 per person for a three-day meeting, and an annual license for Adobe Connect or other online meeting platform.

# STANDING COMMISSION ON THE MISSION AND EVANGELISM OF THE EPISCOPAL CHURCH

## Membership

The Rev. Deborah Royals, *Chair*, 2015  
Mrs. Mary B. Stevenson, *Vice Chair*, 2015  
Ms. Kaileen Alston, *Secretary*, 2012  
Ms. Megan Anderson, 2015  
The Rev. Canon Dennis Blauser, 2015  
The Rev. Canon Virginia Doctor, 2015  
Mr. Sam Dorr  
The Rt. Rev. Julio Holguin, 2015  
The Rt. Rev. Jeffrey Lee, 2015  
Mr. Jim Naughton, 2015  
Ms. Rebecca Roberts, 2015  
The Rt. Rev. Dabney Smith, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. Susan Brown Snook, *Executive Council Liaison*  
The Rev. Daniel Velez-Rivera, *Liaison to the President of the House of Deputies*  
The Rev. Thomas Brackett, *Staff*

### *Changes in Membership*

There were three changes in the membership of the Commission this triennium: Ms. Megan Anderson, having been appointed as a lay member of the SCME, was ordained in 2013, making her appointment invalid; she was not replaced. Mr. Jim Naughton resigned, and Mr. Sam Dorr resigned the commission for personal reasons; neither was replaced.

### *Representation at General Convention*

Deputy Molly Stevenson and Bishop Dabney Smith are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To identify, study, and consider policies, priorities, and concerns as to the effectiveness of The Episcopal Church in advancing, within this Church's jurisdictions, God's mission to restore all people to unity with God and each other in Christ, including patterns and directions for evangelism, Church planting, leadership development, and ministries that engage the diversity of the Church's membership and the communities it serves; and to make recommendations to General Convention.

Given this charge, and guided by the Church's stated focus on the Five Marks of Mission — to proclaim the Good News of the Kingdom; to teach, baptize and nurture new believers; to respond to human need by loving service; to seek to transform unjust structures of society; to challenge violence of every kind and to pursue peace and reconciliation; and to strive to safeguard the integrity of creation and sustain and renew the life of the earth — the Standing Commission on Mission & Evangelism concentrated its work on our Church's approach to mission and evangelism.

## Meetings

### **St. Louis, Missouri; November 12-15, 2012**

Members of the Commission gathered for the first time and reviewed the work of the previous triennium and the resolutions referred to the SCME, and established a budget for the triennial work.

The Commission considered resolutions that had been referred to it by General Convention. These include Resolution A010, which calls upon the Standing Commission to help develop parameters for the parochial report that would include the full scope of mission and ministry expressed in The Episcopal Church; and A076, a resolution on strengthening small congregations.

Essential to our work are the definitions of “mission” and “evangelism” — both of which were defined in our previous triennial work. This body adopted them as our understanding going forward.

- Mission: “The mission of the church is to restore all people to unity with God and each other in Christ” (Book of Common Prayer, 855). “Mission is our response to God, stretching our personal and community boundaries to participate in God’s purpose to restore and heal all of creation” (2009 *Blue Book* report).
- Evangelism: “To share by word and example the Good News of God in Christ” (Book of Common Prayer, 306). Evangelism is sharing the love of Christ and the good news of God’s actions in our lives — the good news of the kingdom coming to life among us — in the language of the people, so that people can become disciples of Jesus Christ (2009 *Blue Book* report).

We broke into working groups, each of which expressed the best use of its gifts to do research, craft strategy, and building relationships around three specific priority areas: *Mission, diversity and identity*, and *leadership and proclamation*. The Commission framed its work in terms of the three “Ls”: Look (at what is working); Lead (by analyzing leadership curricula, developing a new one, and initiating trainings); and Live (as in getting on with the work among God’s diverse people.)

Over the next several months, the Commission experienced three changes that greatly impacted its ability to move forward until these changes were addressed. The first was the notification that our Secretary was not able to continue due to a conflict of interest. The second was the notification that the \$41,350 budget requested had been reduced to \$16,000 and that the Commission was being encouraged to do all of its work via Adobe Connect and at one face-to-face meeting. The third action taken related to the notice that Ms. Megan Anderson, Co-Chair, would no longer be eligible to serve as appointed due to her ordination.

### **Adobe Connect meeting June 18, 2013**

The Commission reconvened in order to elect a new Secretary and to revise the work of the Commission to meet the budget allowed for the triennial work. The subgroups revised their work, given the budget constraints, and will seek to collaborate with Executive Council’s Committee on Local Mission and Ministry, the Standing Commission on the State of the Church, and TEC staff officers in order to realize triennial goals.

### **Adobe Connect meeting July 16, 2013**

The Rev. Susan Snook led the SCME in addressing the budget-visioning questions provided by the Executive Council’s Joint Standing Committee on Finances for Mission.

### **Adobe Connect meeting February 6, 2014**

A joint meeting with Executive Council’s Joint Standing Committee on Local Mission and Ministry reflected the call to collaborate with other committees, commissions, and staff in order to realize the triennial goals. Minutes for this meeting were documented by LM&M and after review of A073 continuity in our work was identified. LM&M shared the applications of the funded ministries with the SCME.

**Adobe Connect meeting March 17, 2014**

Three goals for the remainder of the triennium were identified. Through the Mission Enterprise Zone-funded ministry, the SCME would be able to reflect back to the Church key factors for identifying and preparing leaders for the Church, while holding up the diversity of faith communities as expressions of our Church's identity and growth, and supporting their full inclusion into the life of the Church. Our success in doing this would be dependent on collaborating with our staff liaison, The Rev. Tom Brackett, and on collaboration with the Standing Commission on State of the Church.

**Adobe Connect meeting May 9, 2014**

The date, time, and place were established for the SCME face-to-face meeting, and the agenda for the meeting evolved to include an invitation for three to five Mission Enterprise Zone-funded ministries that would come and present their successes, challenges, and reflections on the process. A subcommittee was established to narrow down the selection process for the invitations, while every member was encouraged to read through the funded applications.

Additionally, it was established that although there had been many changes and setbacks for the Standing Commission on the State of the Church, an open line of communication had been established regarding Resolution A010 and the revision of the parochial report. A conversation with the Standing Commission on the Structure of the Church had also revealed an interest in pursuing support to revise the Parochial Report. However, it was also established that the timeline for creating revisions differed from the standard triennial work of the standing commissions. The Standing Commission on the State of the Church will make recommendations for the succeeding body to pursue this work, and the SCME proposes the following resolution to be considered at the 78th General Convention in 2015.

**PROPOSED RESOLUTIONS**

**A084: MODIFY PAROCHIAL REPORT**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Parochial Report be modified to include reporting of congregational activity in all five Marks of Mission; and be it further

*Resolved*, That each diocese be encouraged to include in its canons a category for associated worshipping communities, which may or may not pay diocesan assessment according to rules established by the diocese, and which should include new church plants, worshipping communities whose design broadens the Church's perspective and reach into mission, and Mission Enterprise Zone initiatives; and be it further

*Resolved*, That such associated worshipping communities file a parochial report each year reporting their membership, ministries, attendance, and financial data; and be it further

*Resolved*, That the main measure of weekly attendance at Episcopal congregations, including associated worshipping communities, shall be Average Weekly Attendance, defined as the sum of Average Sunday Attendance and Average Distinct Attendance, as defined below; and be it further

*Resolved*, That the Parochial Report be modified to include a category to report Average Distinct Attendance, defined as average per-week attendance at non-Sunday worship services, most of whose participants do not attend regular Sunday services, e.g., Episcopal school worship, worship services at retirement centers, house churches, and other such non-Sunday worship congregations; and be it further

Resolved, That the Parochial Report be modified to report the names of lay leaders who are licensed under Title III, Canon 4.1.a, or who are otherwise recognized by the ecclesiastical authority, who have primary leadership responsibility for worshipping communities.

#### EXPLANATION

The proposed changes expand the Parochial Report to more completely reflect the extension of mission and ministry in our congregations, including many worshipping communities that have previously not been reported within the Parochial Report.

#### **Adobe Connect meeting July 1, 2014**

Five ministries funded in part by the Mission Enterprise Zone funding were identified and would be invited to present to the SCME in person at the upcoming meeting in New Mexico. The chair of LM&M updated the SCME on its recommendation to Executive Council to ensure future funding of the Mission Enterprise Zones in the new budget. They were also looking forward to the web platform that would highlight these ministries for the Church. Approval to fund this project was successful and would be coordinated by The Rev. Tom Brackett's office in collaboration with Communications. Bi-monthly forums in which to share best practices and establish a support network for ministry developers had been established and are being hosted by The Rev. Tom Brackett.

The SCME identified a key challenge for the Church as it reflects on how it lives out God's mission and ministry in the world. The system supports a budget-driven process that not only limits, but also eliminates growth through new expressions of faith communities. A key example of this process is found in the limitations created in preventing standing commissions from meeting face-to-face throughout the triennium. While technology has created new opportunities for communication, it is not the opinion of this Standing Commission that it was intended to replace all other forms of communication.

#### **Bosque Center, Albuquerque, New Mexico, September 29 – October 2, 2014**

Our time together was framed in Gospel Based Discipleship and began with a review of our triennial work. The Rev. Tom Brackett (staff liaison) and Anne Watkins (chair of LM&M) joined us by conference call and shared their own summary of the triennial work as well as the challenges of a system attempting to transition toward being more mission-minded.

A framework for each of the Mission Enterprise Zone ministry developer's time with the SCME was established and served as a tool for setting the goals for this report. The four ministries reporting include a fair cross-section of the ministries funded. One new bi-cultural church plant, one new church plant, one Native American ministry and one new expression of an ecclesial community were represented. Each of four ministries shared a description of the ministry, their challenges and hopes for the ministry, a very frank reflection of the funding process, their diocesan support, and the online forums. Common themes from these reports include:

- There is a continued need for funding.
- It is refreshing that TEC recognizes ministry in the margins of the Church.
- Recognition that the level of diocesan involvement in these ministries varies greatly, as does their understanding of how funding is accounted.
- Communication from TEC to the Church and from the Church to TEC is often insufficient, ineffective, and cumbersome.
- Clarity of process (application and reporting) would be more helpful.
- Collegial and peer support of ministry developers is difficult to establish and maintain, let alone to develop best practices as a way to encourage future growth in mission-minded ministries.
- Quarterly reports could be more relevant to ministry.

There was a clear sense of the incarnational ministry in all the ministries presented. It was also clear that the Mission Enterprise Zone (A073) funding has been a first step in the Church's goal to be more mission-minded and mission-driven. Given what we have learned about the importance of funding mission in a very intentional way, and about the contribution that it can make toward the structure of the Church's reflecting a more mission-driven attitude, we commend the following resolution.

**A085: CONTINUE MARK 1 FUNDING (MISSION ENTERPRISE ZONES)**

*Resolved*, the House of \_\_\_\_\_ concurring, That each Diocese be encouraged to identify Mission Enterprise Zones, defined as a geographic area, as a group of congregations, or as an entire diocese committed to creating worshipping communities of people who are historically underrepresented and underserved in The Episcopal Church; and be it further

*Resolved*, That each Diocese also be encouraged to identify opportunities for evangelistic mission within the diocese, including areas where new churches could be planted to reach new people with the gospel of Christ; and be it further

*Resolved*, That the 78th General Convention continue to fund the First Mark of Mission initiatives, including church planting and Mission Enterprise Zones; and be it further

*Resolved*, That the First Mark of Mission grants shall be administered by a grants committee established for that purpose by Executive Council; and be it further

*Resolved*, That Dioceses are encouraged to apply for one or more First Mark of Mission matching grants to facilitate the development and support of new church plants or Mission Enterprise Zones, with exceptions to the requirement for diocesan matching funds in cases of diocesan financial limitations; and be it further

*Resolved*, That the Presiding Bishop and the President of the House of Deputies appoint a Task Force on Mission and Evangelism to share resources and best practices for church planting and Mission Enterprise Zones with the wider Church to create and oversee a process for accountability for such grants, including discussion with the grants committee, and communication with dioceses about the availability of grants and the process for receiving them; and be it further

*Resolved*, That the Communications Office, in collaboration with the Task Force on Mission and Evangelism, create and maintain a website with video and other resources to share the stories and ideas of Mission Enterprise Zones and church plants with the wider Church; and be it further

*Resolved*, That the Task Force on Mission and Evangelism bring together mission developers of Mission Enterprise Zones and church plants that receive funding under this resolution once each triennium for a face-to-face gathering for sharing of best practices, upholding ministry leader wellness; mutual guidance and support; and sharing of stories, resources, and prayer; and be it further

*Resolved*, That dioceses be encouraged to officially recognize and incorporate new church plants and Mission Enterprise Zones into the full life of the diocese, including voice and vote at diocesan conventions, convocations, or councils; and be it further

*Resolved*, That together, diocesan leaders and ministry developers report to the Task Force on Mission and Evangelism the results of their development of church plants and Mission Enterprise Zones annually, according to a process developed by the Task Force; and be it further

*Resolved*, That the 78th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of \$5 million to implement this resolution during the 2016-2018 triennium.

EXPLANATION

*And Jesus came and said to them, “All authority in heaven and on earth has been given to me. Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything that I have commanded you. And remember, I am with you always, to the end of the age.” – Matthew 28:18-20*

Mission Enterprise Zone and church plant funding was created by the 77th General Convention and has resulted in 40 projects across the Church, receiving a total of \$2 million of funding. The availability of this funding has encouraged and enabled the development of many new and creative forms of worshipping communities across the Church. The development of new churches and new forms of worshipping communities needs to continue in the next triennium in order to reach new people, including those who are historically underrepresented in The Episcopal Church. The funding in this resolution will continue to encourage and enable the development of such new communities.

With the growth of the Latino population in the United States, it is also imperative that our Church plan proactively in response to the growth. Pew Research provides the compelling statistics<sup>1</sup> supporting this need as does current census data.<sup>2</sup> We are called to be the Word of God in the world, responding contextually as our baptismal vows lead us to respect the dignity of every human being, and responding as a community of faith rather than a system of programs. We commend to General Convention this resolution in response to the need.

A086: CREATE TASK FORCE FOR LATINO-HISPANIC CONGREGATIONAL DEVELOPMENT AND SUSTAINABILITY

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirm the work that the Office of Latino/Hispanic Ministries has done to identify congregations located in areas with high Latino/Hispanic populations and to provide them with detailed demographic reports, leadership training, training in cross-cultural awareness and marketing and advertising resources to help these congregations and other resources; and be it further

*Resolved*, That the Presiding Bishop and President of the House of Deputies, with the advice of the Missioner for Latino/Hispanic Ministries, create a Task Force on Latino/Hispanic Congregational Ministry Development to provide consultants who will work with congregations, lay leaders, clergy, and diocesan staff to implement the provisions of this resolution; and be it further

<sup>1</sup> <http://www.pewhispanic.org/2008/02/11/us-population-projections-2005-2050/>

<sup>2</sup> <http://www.census.gov/prod/cen2010/briefs/c2010br-02.pdf>

*Resolved*, That the 78th General Convention direct the Office of Latino/Hispanic Ministries, in collaboration with the Task Force on Latino/Hispanic Congregational Ministry Development, to continue creating formation and leadership development resources and programs to meet the needs of clergy and lay leaders currently serving in Latino/Hispanic ministries, including the programs with the Evangelical Lutheran Church in America and other ecumenical partners focused on the continuing education and leadership development of clergy and lay leaders; and be it further

*Resolved*, That the Office of Latino/Hispanic Ministries, in collaboration with Task Force on Latino/Hispanic Congregational Ministry Development, create mechanisms for mentoring and coaching of clergy currently working in Latino/Hispanic ministries; and be it further

*Resolved*, That the Office of Latino/Hispanic Ministries, in collaboration with the Task Force on Latino/Hispanic Congregational Ministry Development, create resources for congregational development and redevelopment intended for diocesan staff, clergy, and lay leaders who are exploring establishing Latino/Hispanic bilingual, multiethnic, and multicultural worship ministries in their communities; and be it further

*Resolved*, That the Office of Latino/Hispanic Ministries, in collaboration with the Task Force on Latino/Hispanic Congregational Ministry Development, create an intensive cultural-competency training program for diocesan staff members, seminarians, clergy, and lay leaders to gain language and cultural skills for ministry in bilingual, multiethnic, and multicultural Latino/Hispanic communities, including collaborations with Evangelical Lutheran Church in America seminaries and other ecumenical partners; and provide educational and media resources that will be easily accessible; and be it further

*Resolved*, That the Task Force on Latino/Hispanic Congregational Ministry Development conduct an annual evaluation of programs and review of the use of resources based on a survey of those being served; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$1,500,000 for the implementation of this resolution.

**EXPLANATION**

This resolution is intended to create a Task Force to oversee a team of professional consultants in collaboration with the Office for Latino/Hispanic Ministries to provide best practices and professional development (coaching) for lay leaders, seminarians, clergy, and diocesan staff in dioceses with existing Hispanic/Latino congregations.

This resolution is also intended to have the Task Force oversee a team of professional consultants in collaboration with the Office for Latino/Hispanic Ministries to provide cultural competency resources for lay leaders, seminarians, clergy, and diocesan staff in dioceses that want to explore Latino/Hispanic Ministries in the Episcopal Church.

Throughout the triennium, the SCME has experienced the true call to reflect God's presence by becoming God's hands, feet, voice, ears, and eyes in the world. This is the call of every person, in every place, and with all they have to offer, because these are the gifts God has provided for us to do God's work in the world.



With the focus of the Church shifting to a more grassroots reflection of this work, we are all being asked to evaluate our effectiveness and efficiency as stewards of the resources we share. The SCME has been most effective when it has been actively engaged in ministry in the Church, as was reflected by the previous triennium and the establishment of Mission Enterprise Zones. We have now reached another level of understanding for next steps, and it is our recommendation that General Convention consider the following resolution.

**A087: CREATE TASK FORCE ON EVANGELISM**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Presiding Bishop and the President of the House of Deputies to create a Task Force on Evangelism to design and develop an Evangelism Resource to support dioceses, local congregations, Mission Enterprise Zone initiatives, and wider church needs as they participate in evangelism; and be it further

*Resolved*, That evangelism resources that have already been developed be collected by the Task Force for Evangelism for possible inclusion in the resource; and be it further

*Resolved*, That dioceses be encouraged to utilize the Evangelism Resource to identify, train, equip, and license lay evangelists in accordance with Canon III.4.9; and be it further

*Resolved*, That the Task Force for Evangelism develop a survey instrument to evaluate each diocese's efforts and results annually during the triennium; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$100,000 for the implementation of this resolution.

**EXPLANATION**

Evangelism is very important for the work of spreading the gospel of Christ. This resolution allows dioceses and congregations to share resources so that all can benefit from each other's work.

**Budget**

The Commission was budgeted \$16,000 for the 2013-2015 triennium. At the time of this report, the Committee had spent \$8,181.12 (\$247.92 Adobe Connect license in 2013 and \$425.00 Adobe license in 2014) with only \$7,508.20 spent for a face-to-face meeting in October 2014.

The emphasis on only meeting face-to-face once during the triennium greatly impacted our ability to form relationships and be productive. By planning to meet in the southwest, the SCME not only experienced a generous hospitality from the Diocese of the Rio Grande, but we also essentially spent only half of what we would have due to our careful stewardship of the resources entrusted to us.

We suggest that the SCME would have benefited from at least one other face-to-face meeting in 2013, particularly considering the scope of the work that had been accomplished in the previous triennium as it led the Church into a more mission-driven view of itself. As the Church considers funding for Task Force work and for the Commission in the future, we would hope that it would take into account the impact of its funding priorities.

# STANDING COMMISSION ON SOCIAL JUSTICE AND PUBLIC POLICY

## Membership

Ms. Sarah Lawton, *Chair*, 2015  
Ms. Laura Russell, *Vice Chair*, 2015  
Ms. Athena Hahn, *Secretary*, 2018  
The Rev. Randolph Charles, 2015  
Ms. Caitlin Frazier, 2018  
The Rev. Canon Daniel Gutierrez, 2018  
The Rt. Rev. Michael Hanley, 2018  
The Rt. Rev. Alan Scarfe, 2015  
The Rt. Rev. Prince Singh, 2015  
Mr. Newland Smith, 2015  
The Rev. Bessie Titus, 2015  
Ms. Bonnie Weaver, 2018  
Mr. John Johnson, *Executive Council Liaison*  
Mr. Alex Baumgarten, *Staff*  
Ms. Jayce Hafner, *Staff*  
Ms. Helen Bluehorse,\* *Consultant*

### *Changes in Membership*

The Rev. Bessie Titus resigned in 2012. Ms. Helen Bluehorse's position was changed in 2012 from member to consultant. Ms. Sarah Dreier resigned her staff position in 2013 and was replaced by Ms. Jayce Hafner.

\*Late in 2014, we received with sadness the news of the death of our consultant and colleague, Ms. Helen Bluehorse of the Navajoland Area Mission. We are grateful for her faithful witness to us and for her contributions to our work in this triennium, especially in the area of food policy. She is deeply missed.

### *Representation at General Convention*

Bishop Prince Singh and Deputy Laura Russell are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To identify, study, and theologically interpret social justice issues facing the United States and their impact on other nations, and to develop and recommend policies and strategies to the General Convention. The members of the Commission have adhered to this mandate as they performed their work and prepared recommendations to the 78th General Convention.

**Meetings:** The Commission began its work at an in-person meeting in St. Louis, Missouri November 12-15, 2012. We then had two teleconferences August 13 and 16, 2013 to continue our work. We met for our second and final time in person November 11-14, 2013 in Linthicum Heights, Maryland. We held our last meeting on August 18, 2014 via teleconference.

The Commission was referred, and took action on, three resolutions from the 77th General Convention. The first, A076, was a mandate to ensure small congregations had voice in our Commission. As many members were from small congregations, we fulfilled this mandate.

A084 called for the Establishment of an Episcopal Credit Union. We discussed this endeavor, but realized we were too small to create such an organization. We also discussed A087, which called for a national conversation on the income gap. Unfortunately, we were unable to procure funds from the Constable Grants to hold these conversations. We did embody the heart of this resolution in our work during this triennium and in the resolutions we put before you now.

### **Statement of Purpose**

All around The Episcopal Church, on the local level, we are feeding people. Countless congregations have food pantries, soup kitchens, and frequent food drives. Some are growing congregational gardens, and a few are even keeping bees and livestock. Some of these projects have been sponsored by Jubilee grants or have been inspired by the principle of Jubilee Centers over many years.

A recent stepped-up focus on food has also been a response to pressing needs in our communities. As middle- and working-class wages have stagnated, national median income has fallen more than 8 percent since 2007, and almost 9 percent since it reached its highest level in 2000, with almost all benefits from the post-recession economic recovery going to higher-income households.

Official poverty levels, which are set unsustainably low at \$23,850 in 2014 for a four-person household, remain stubbornly high at 14.5 percent in 2013 (almost 20 percent for children); and without safety-net programs, poverty rates would be doubled. Even with safety-net programs, many families rely on charitable programs provided by non-profits and faith communities to put food on the table, month after month.

Children are particularly vulnerable, with 22 percent living in households that are food-insecure, meaning that the children may not be sure if they will be fed on a given day. Food insecurity among US children increased 35 percent between 2007 and 2011. Each day during the school year, 21.5 million children eat free or reduced-price school meals, including breakfast and lunch; and for many children, including inner-city, rural, reservation, and even many suburban locations, these meals may be their only food for the day.

The school lunch program is also deeply entangled with the farm subsidy programs. Farm subsidies continue to assist farms, while the subsidized food continues to supply the National School Lunch Program. However, the legislative bedrock for the program, the Farm Bill, has been withered in its ability to provide for the least among us. Public assistance measures such as SNAP (Supplemental Nutrition Assistance Program) have seen reductions in funding, while the majority of the federal budget continues to be spent on defense.

These references are not the Church playing politics. The Book of Common Prayer leads us to consider the poor and neglected among us, using these words: “Almighty and most merciful God, we remember before you all poor and neglected persons whom it would be easy for us to forget: the homeless and the destitute, the old and the sick, and all who have none to care for them. Help us to heal those who are broken in body or spirit, and to turn their sorrow into joy. Grant this, Father, for the love of your Son, who for our sake became poor, Jesus Christ our Lord.”

As a Church that prides itself on praying that shapes believing, we have a task before us of learning how to be formed into the image of our Lord Jesus Christ in reference to identity with the poorest of our brothers and sisters, as well as to provide for children as the greatest in the Kingdom of heaven. Jesus continually speaks of the poor and of our calling for the physical care of our neighbors; and Matthew 25:31-46 has become one of the most well-known passages of the Gospels.

There are few parishes that are not involved in some kind of food ministry, and many Episcopalians are finding their way to farmers’ markets and are joining the CSA (Community-Supported Agriculture) movement. This activity is also linked with issues of climate justice, in which we recognize that the poorest

suffer the most at the ravages of an increasingly estranged nature; and the way we grow our food is an issue of climate justice.

The rich are getting richer, and the gap continues to expand. At the same time, there is a tendency to resist tackling systemic causes that perpetuate the situation. Why is there poverty? Why do people go without food while others live in abundance? Human sinfulness is a root cause of this, and so simply knowing of our disparity is insufficient to overcome our tendency to self-protection or self-service. There is a need for deeper inner transformation, and the Church recognized this reality.

The Church has recognized the need for deeper formation processes in becoming aware of racial relations, and even in being able to provide for a safer Church with regard to our children and with regard to appropriate adult relationships within the Church; and has mandated training for those in leadership, both lay and ordained. We believe that when it comes to our discipleship in following the One who became poor that we might become rich in Him, we need more than a workshop on identifying the needs of others; we need a process of formation that helps make us one across our socio-economic barriers. It takes time to allow ourselves to recognize the layers of resistance that separates us from the experience of living in poverty, which might then enable us to move further up the systemic chain of events out of which poverty grows.

Just as the body of Christ has many parts but is one Body, we acknowledge that this is an effort of unity in diversity, both in the alleviation of poverty through immediate responses such as food pantries, charitable giving, and community gardens; and also in those actions that engage our legislatures and the creation of humane and reasonable state and federal budgets. The Church's own budget priorities need to be challenged, as does our tendency to function at the high end of privilege which, by its nature, exempts the poorer members of our Church from offering their important leadership. Ultimately it is the enabling of the voice of those for whom poverty is a daily experience to articulate their demands and needs from our common wealth that is the Church's prophetic mandate.

At the same time, we recognize that we are living in a time when food and water security is not assured for everyone on the planet. Addressing this issue will require a serious look at the growing disparity in wealth, which impacts health and well-being and potential prospects for many. It is also felt among immigrants, the younger generation, and the elderly, as well as along the racial divide.

This Church has sought in recent Conventions to highlight the impact of slavery and the Doctrine of Discovery, and this is no time to take the spotlight off these original sins of the nation. However, there are no resolutions, as such, focusing on the responsibility and contribution of global corporations in this growing disparity. Yet they remain a significant player, and we realize that a large proportion of Episcopal leaders hold positions of leadership and influence at the corporate level. Formation and discipleship needs to support their efforts to become aware of the ethical impact of their presence for godly influence.

All of this has led the Standing Commission to focus on resolutions for this General Convention that seek new formation processes to enable us to overcome deeper resistance to engagement with those living in poverty. Although it continues to be important that we lift our voice as Episcopalians for social justice in a collective way on national and global issues alongside other faith communities, we know the work of Christian formation for this work happens most effectively on the local (diocesan and congregational) levels.

We hope all of the concerns we present will be addressed at the level of broad policy through our Office of Government Relations (OGR) and the Episcopal Public Policy Network (EPPN), but most importantly we hope they will be undertaken on the local level. We believe that social-justice work — which certainly needs to address systems and root causes — also starts with relationships, and that means formation and engagement with the people in our neighborhoods, towns, and cities.

We invite the Church to address the disparity of wealth between us, especially as it might influence this disparity through a reform of the tax code. We have extensively looked at issues of food security. We therefore offer resolutions on the following: food security; entitlements; defense spending; the tax code; engagement of all peoples; and working through relationship-based social justice.

Finally, we ask the Church to take a serious look at its impact on these social ills. While honoring work done in the immediate relief system, we call the Church to look further up the system and to ask questions of our practices and belief system that perpetuate disparity and poverty. Being identified with the lost, needy, and “least of these” as a servant is God’s reconciling method. That is how God makes us one; and as ambassadors with Christ, we are invited to follow God’s ways. The Book of Common Prayer states that the mission of the Church is to “restore all peoples to unity with God *and with each other in Christ.*” To that end, along with our prayers and worship, we seek to promote justice.

Walter Wink warns of a consolidation of negative spirituality that has us in its grip. He calls it a Domination system. “This spirit-killing atmosphere penetrates everything, teaching us not only what to believe, but what we can value and even what we can see.” To such a situation, we must remind ourselves that in Jesus “*God made you alive together with Him, when He forgave us all our trespasses, erasing the record that stood against us with its legal demands. He set this aside, nailing it to the cross. He disarmed the rulers and authorities and made a public example of them triumphing over them in it*” (Colossians 2: 13b-15).

Christ’s message is our liberation to serve, our freedom to be one with others. This engages every part of our spiritual lives and common existence including our socio-economic selves. To this liberty, to this self-awakening, we call the Church.

The Commission, based on its meetings and its review of social justice issues, presents the following resolutions for action to the 78th General Convention:

**PROPOSED RESOLUTIONS**

**Food Ministry**

**A091: AFFIRM WORK FOR FOOD MINISTRIES AND FOOD SECURITY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th Convention affirm the work and projects being carried out across the Church in food ministry, including food pantries, feeding programs, community gardens, educational programs, and advocacy; and be it further

*Resolved*, That this Convention reaffirm and celebrate the continuing of Native and Indigenous Episcopalian communities in carrying out Asset-Based Community Development, including food ministry such as the project in Navajoland to teach the children to grow and prepare traditional Navajo food; and be it further

*Resolved*, That this Convention call on dioceses, congregations, and all the baptized to deepen our understanding of the moral implications of how our food system works, through educational programs on food issues, looking at issues of sustainability, equity, and accessibility of all people to healthy food; and be it further

*Resolved*, That this Convention call on dioceses, congregations, and all the baptized to deepen our commitments as Christian communities to address food insecurity, food-related health issues, and food-related environmental effects in our communities and nations, through new and creative community, regional, and ecumenical projects, such as, but not limited to, school and community gardens, church garden

tithing to food banks, involvement with migrant ministries, and farm-worker and food-worker organizing; and be it further

*Resolved*, That this Convention call on dioceses, congregations, and all the baptized to increase our involvement in advocacy on food issues, using principles of sustainability, equity, and accessibility of healthy food for all people; and it further

*Resolved*, That this Convention reaffirm this Church's support for farm legislation that is based on the following principles (originally enumerated and affirmed by the Presbyterian Church, USA in its 220th General Assembly, 2012): *renewability, sustainability, resilience, minimized carbon emissions, participatory research and decision-making, revitalized rural communities, strong local food economies, security of food supply, ethical treatment of animals, and fair and dignified treatment of persons working throughout the food chain*; and be it further

*Resolved*, That this Convention support public policies and laws that protect the health and safety of workers throughout the food system, from farms to distribution systems to stores to restaurants, which support the workers' rights to organize; and which support a fair family wage for food workers throughout the system, from farm workers to warehouse workers to fast-food workers; and be it further

*Resolved*, That this Convention support public policies and laws designed to protect our Earth's natural environment and to protect humanity's ability to produce food for generations to come, including restrictions on pesticide overuse, harmful industrial farming practices (e.g., overcrowding of livestock), and carbon emissions throughout the food system that threaten animal and human health, damage the soil, and threaten the climate for future generations; and be it further

*Resolved*, That this Convention support public policies, laws, and programs designed to increase access to healthy food for all people, including support and development for farmers' markets, policies permitting use of the Supplemental Nutritional Assistance Program (SNAP) benefits at farmers' markets, and the development of policies and agreements that encourage the siting of full-service grocery stores in low-income neighborhoods and communities; and be it further

*Resolved*, That this Convention support policies and local school and community programs, such as school gardens, which support nutrition education for adults and children, recognizing that many people in recent generations are unaware of what is healthy food or how to prepare food; and to work with communities to help improve access to healthy and affordable food and places to be active; and be it further

*Resolved*, That this Convention reaffirm support for full and adequate funding for public food programs for the poor and vulnerable, such as the National School Lunch Program, Women, Infants, and Children (WIC) program, SNAP, senior center feeding programs, and summer feeding programs for children, so that families, elderly, children, disabled, unemployed, and others can meet their basic nutritional needs with food that is healthy.

**EXPLANATION**

Food is central to life, both in sustaining our physical lives and nurturing our community and family lives, and in how we prepare and share food. Food in the form of bread and wine is also at the heart of our sacramental life in the Eucharist. Providing for the needy and for widows and orphans, and offering hospitality to strangers in the form of food, are Biblical mandates in both Hebrew and Christian Scriptures. The Early Church organized its common and liturgical life around gatherings with food and made arrangements, beginning with the first deacon, Stephen, to feed the hungry. It is hard to imagine anything more elemental and universal in our material life than food, along with water and air.

The central sacrament of Eucharist grounds us in this literal and metaphorical convergence that impacts our common life in a way that is contextual, abundant, and sustainable. The root word from which we get "companion" is "*panis*," meaning bread. As followers and friends of Christ, we are called to be "bread fellows" building beloved community. The identity of giver and receiver is blurred or lost in such holy encounters where heaven does come down. This blurring of the distinction between giver and receiver is a holy economy articulated in the Taize chant, "I come like a beggar with a gift in my hand."

The need is great and is increasing even more in these challenging times, and our engagement as followers of the bread of life helps reflect the abundant life he promises. The five marks of mission, in a nutshell, are about sharing the Good news, nurturing new believers, helping those in need, working toward fairness, and taking care of the planet. Engagement with food can align all marks of mission.

Perhaps this is why so many, if not most, of our congregations are already involved in some way in food ministry, from actions as simple as occasionally collecting cans of food for the local food bank to more complicated programs such as running soup kitchens and food pantries. This is good news! However, as our nation's and world's food systems have grown more complex and industrial, even while hunger persists — even while, ironically, hunger persists among many of those workers who grow, transport, prepare and sell our food — it can be hard to imagine how a local band of Christians can help to "feed the hungry" on a national or global scale.

This resolution asks and encourages Episcopalians at all levels to engage in both direct action and advocacy at both local and national levels in response to this most elemental Biblical call, to feed the hungry. Wherever we are located, and whatever level of activity exists already, we call on the Church to take another step for food justice — whether that means setting up a local food pantry, planting a garden, or educating ourselves about food systems and how they work. We also encourage the Church to advocate at all levels of governance for the hungry and for a just food system.

**Government Entitlements**

**A092: AFFIRM SUPPORT FOR GOVERNMENT ENTITLEMENTS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church affirm that God has provided for all of creation, forming a world of sufficiency for all, and that inequality exists not because there is not enough, but because of the way resources are distributed; we depend on God and one another and are commanded to feed the hungry, clothe the naked, and comfort the suffering and afflicted; and be it further

*Resolved*, That this Convention affirm its support for full funding of government programs such as Medicare, Medicaid, Social Security, Supplemental Nutrition Assistance Program (SNAP), food assistance for Women,

Infants, and Children (WIC), the National School Lunch Program, and the Affordable Care Act, all of which lift and keep people out of poverty and address basic food and health care needs in vulnerable populations.

**EXPLANATION**

The wealth gap between rich and poor is widening at an alarming rate, further stratifying our society. Executive pay has sky rocketed, increasing 127 times faster than worker wages (<http://thinkprogress.org/economy/2012/05/03/475952/ceo-pay-faster-worker-pay>).

Thirty-seven million Americans live below the official poverty line, while millions more teeter on the brink of poverty (<http://www.americanprogress.org/issues/poverty/news/2007/04/24/2923/the-poverty-epidemic-in-america-by-the-numbers>).

Entitlement programs such as Social Security, Medicare, Medicaid, WIC, and SNAP are being targeted for substantial cuts and reductions based on partisan legislation. These programs, which have lifted millions of Americans out of poverty, allow them to live with dignity and are desperately needed for those still living at or near poverty. Continuing these programs should be a priority of good government.

**Defense Spending**

**A093: EVALUATE DEFENSE SPENDING**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention commit The Episcopal Church to work for a reordering of federal budget priorities, with a goal of evaluating the balance between legitimate military security needs and poverty alleviation programs; and be it further

*Resolved*, That The Episcopal Church encourage the federal government to reduce military expenditures wherever possible in favor of poverty alleviation programs.

**EXPLANATION**

Guns vs. butter: It is the classic debate learned in basic economics. What is the priority of the federal budget — military spending, or national (domestic) needs? The United States currently spends more on defense than do the next eight countries combined. Defense spending equals Social Security spending, or the combined spending on Medicaid and Medicare.

The United States needs a ready military, but it also needs a strong domestic economy. In the current economy of the United States, poverty alleviation programs are underfunded, and federal monies never seem to be available to fund these programs fully, and yet a large portion of government spending is used for the military and defense establishment. Frequently money is diverted from poverty alleviation and other domestic programs. The Episcopal Church needs to work toward a fair federal budget — one that does not leave us vulnerable, yet also takes care of the most vulnerable among us.

**Income Tax**

**A094: SUPPORT INCOME TAX PARITY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church support efforts to reduce economic disparities in the United States by:

Calling for a reversal of federal tax cuts, such as decreased taxes for the highest tax brackets, for inheritances, and on capital gains; and tax cuts that have increased the wealth gap and reduced budget revenue for domestic needs; and



Calling for a reversal of the recent erosion of progressivity in federal tax rates, as highly progressive tax rates were a means of building a strong middle class in the past, and must be an important means of reducing severe inequalities of income and wealth in the future.

#### EXPLANATION

The tax code of the United States is one of the main factors in growing the “wealth gap” in the United States. The tax cuts that have been enacted in recent years help those in the highest wealth (income and assets) categories to retain this wealth. The money that is not received by the government from taxation cannot be given to support poverty alleviation programs, and as such the wealth gap only continues to expand.

Even though the tax code contains one of the largest poverty-alleviation programs in government (Earned Income Tax Credits), it is not enough. An erosion of the progressivity in tax rates has left those in the lower and middle brackets paying the same, if not more, as the nation’s highest incomes. It has also left the federal government with limited funds to support poverty-alleviation programs such as Supplemental Nutritional Assistance (SNAP), Social Security, and Medicaid.

The Episcopal Church’s support for social-welfare programs, social justice, and poverty alleviation should continue to this next step. These programs must be funded by a tax base — a tax base based on the Christian principle that those who have more should pay more so that everyone in our society has a chance.

### **Resolution of Engagement**

#### A095: DEEPEN ENGAGEMENT OF ALL PEOPLE

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church challenge the baptized throughout all congregations of our Church to deepen the Gospel work of unmasking attitudes and institutions that help maintain the structural injustice of wealth disparity by ongoing formation of engagement among those on both sides of the wealth divide.

#### EXPLANATION

Mark 4 Mission, “to seek to transform unjust structures of society, to challenge violence of every kind and to pursue peace and reconciliation” gives The Episcopal Church the grounds for raising to consciousness those attitudes and institutions that help maintain the structural injustice of wealth disparity. Just as members of anti-racism teams name white privilege as a major impediment to enabling white people to acknowledge their entitlement gained at the expense of people of color, there must also be an acknowledgement of the privilege of wealth and the structural injustice of wealth disparity.

In her paper, “White Privilege: Unpacking the Invisible Backpack,” author Peggy McIntosh defines white privilege as “an invisible package of unearned assets which I can count on cashing in each day, but about which I was ‘meant’ to remain oblivious.” McIntosh goes on to reflect how pervasive white privilege has become in American social systems, and argues that to “redesign social systems we need first to acknowledge their colossal unseen dimensions. The silences and denials surrounding white privilege are the key political tool here.”

The privilege of wealth is similar. It is a set of invisible assets that are used every day. Unmasking of attitudes and institutions of wealth disparity will take restructuring of social and political systems. It will take long-term formation and engagement that includes all peoples.

It may be that engagement between those on both sides of the wealth divide is a way for those with “wealth,” many of whom are white, to have their lives interrupted by the reality of the lived lives of those

without “wealth.” In her book, *Kinship Across Borders: A Christian Ethic of Immigration* (Georgetown University Press, 2013), author Kristin E. Heyer describes the work of Dolores Mission Parish in East Los Angeles as a case study of ongoing formation of engagement between those on both sides of the wealth divide. This Jesuit parish took a risk by opening its doors to the homeless and to the day laborers of Los Angeles, many of whom were undocumented workers. But they did not stop by simply providing a safe place for meals and sleep. The parish, in time, found kinship with the “other.”

Just prior to Lent 2006, as a shared spiritual exercise, the parish undertook a month-long communal fast for justice for immigrants. Participants conceived of the fast as both prayer (in terms of the desire to empty ourselves of what distracts us from knowledge of God’s love) and as an act of solidarity (a bond of sympathy with those who, like so many immigrants, suffer physical, spiritual, and emotional hunger). The prayer and fasting were coupled with prophetic preaching and consistent legislative advocacy and voter education on behalf of comprehensive and humane immigration reform.

On Good Friday 2008, the community undertook a Way of the Cross procession through the city, culminating at the federal building downtown. The parishioners united their own sufferings with Christ’s passion; and public devotionals at each station focused on issues such as poverty, families torn apart by US Immigration and Customs Enforcement (ICE) raids, and exploitative labor practices. This engagement, by both sides, brought together those with and without privilege, and taught each side not only the meaning of formation and engagement, but also the idea of unmasking attitudes and seeking institutional change.

### **Relationship-Based Social Justice Ministry**

#### **A096: AFFIRM RELATIONSHIP-BASED SOCIAL JUSTICE**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention affirm the many justice ministries of service and advocacy throughout The Episcopal Church, ministries that are grounded in the Baptismal Covenant and that were initiated by General Conventions, dioceses, congregations, and other Episcopal organizations; and be it further

*Resolved*, That this Convention affirm and encourage the use of various methods to discern, develop, and sustain justice ministries, such as Asset-Based Community Development, needs surveys, and community organizing; and be it further

*Resolved*, That this Convention affirm and encourage the formation of partnerships between congregations and service providers, advocacy agencies, and other organizations in order to do justice ministry more effectively and efficiently; and be it further

*Resolved*, That this Convention acknowledge that one of the greatest challenges of our time and culture is the widening gap between the rich and the poor, the sin of economic injustice that pervades our society; and be it further

*Resolved*, That this Convention challenge all Episcopalians to hear in a bold way the call of both Jesus and St. Francis of Assisi to befriend and be with the poor, and that we come to know that the future vitality of The Episcopal Church is grounded in our mutually affirming relationships with our brothers and sisters who are poor; and be it further

*Resolved*, That this Convention encourage all Episcopal congregations to establish relationship-based, social-justice ministries through which relationships are developed between those who serve and those who are served, resulting in shared and transformational experiences and in a greater commitment to work for justice on all sides of the socio-economic divide; and be it further

*Resolved*, That this Convention ask Episcopal groups that are participating in relationship-based social justice to share their experiences with the broader Church through social media, the internet, and official communication channels, so that other groups can learn from their successes, challenges, and insights.

#### EXPLANATION

Servant ministry takes place when people with resources respond to the needs of people without resources, so that there is a more equitable distribution. Advocacy ministry is action taken in order to address and effect change in regard to a systemic injustice. Relationship-based social justice is ministry that both responds to human needs and moves toward advocacy for systemic change, but it is centered and grounded in relationship experiences between people who have been separated by some social divide, such as race, gender, age, sexual orientation, education, ability, wealth, or religion.

Jesus commanded us to “love one another.” The Baptismal Covenant first asks, “Will you seek and serve Christ in all persons, loving your neighbor as yourself?” Then it asks, “Will you strive for justice and peace among all people, and respect the dignity of every human being?”

With conflicts and encounters between groups of people, it is possible to reach agreement on what is fair and just through reason and education; however, in order to know God’s justice, our hearts must be touched in a way that enables people with differing perspectives and circumstances to be emotionally connected to each other, which can only happen through relationships. In moving toward a greater degree of racial justice and sexual-orientation justice, progress has been made through legislation. Deep justice, however, only comes when the divide is diminished through relationships.

The hope of relationship-based social justice is that both parties are changed and transformed. It all begins with a shared activity or conversation in a structured and supportive environment. Let’s say that a homeless man and a middle-class woman share a meal and conversation as part of a justice-ministry activity. They are strangers to each other. They have little in common, and yet during the course of that meal, something happens.

The woman decides that homeless men are not that threatening after all. She enjoyed sharing a meal and stories with the man, and she realized that homelessness was an issue that she could embrace. She decided to become an activist because of her personal encounter. The man was, at first, self-conscious, but he could tell that the woman was genuine and authentic. She was really interested in what he had to say, and he was interested in learning about her. It was just a 30-minute meal and conversation, but he walked away feeling affirmed and encouraged to take more steps toward personal stability.

Relationship-based social justice does not replace any of the many dimensions, types, and practices of justice work. It does, however, remind us that as Christians, responsible and mutually transformative relationships are at the center of our faith journeys.

#### **Goals for the Next Triennium**

No one standing commission, in one short period of time, could possibly look at all issues or at every angle of how our Church should support social justice in the public realm. We are a relatively new commission (formed in 2009), so we have felt the responsibility of helping to shape its mandate.

In addition to the resolutions referred to us, we tried to focus on areas where there may be gaps in our Church's public statements, which provide a basis for the work of our Office of Government Relations (OGR) and the Episcopal Public Policy Network (EPPN). This is why, for example, we did not address immigration reform, which is an abiding concern, but one about which we have many previous and comprehensive statements from General Convention. On the other hand, the fairness of our tax system is an issue that has been addressed by other faith groups, but is an issue about which The Episcopal Church has said relatively little.

We also tried to address broad issues, such as the growing wealth gap and food insecurity, which provide a lens for thinking about structural injustice. The process of discussion of these led us to conversations about how we understand justice and injustice theologically; about processes of formation for the work of Christian witness in the public square; and about how to connect our church-wide statements on social justice with the work of ministry in local communities.

We know we have only skimmed the surface.

We commend the ongoing work of the OGR and EPPN that faithfully calls us to advocate for the social-justice concerns articulated by General Convention and Executive Council. We especially appreciate that so much of their work is accomplished with our Anglican, ecumenical, and interfaith partners; this joint work magnifies our witness and makes it more effective. We hope our resolutions will provide the OGR and EPPN with helpful mandates to better carry out this good work in the future.

In the brokenness of our world — brokenness that separates us from each other and from God — we reaffirm the call to witness to injustice and to help build the beloved community. We believe that this work has to begin, as so much of Christian witness must, in the local communities and regions where we meet each other face to face.

We call on all of us Episcopalians to deepen our engagement at the local level with theology of social justice, with education and formation in social justice work, and with the building of relationship-based social justice work as a foundation for broader witness in the form of advocacy for public policy and social change. We hope our Commission's efforts will encourage further prayer, debate, and action at local (congregational and diocesan) levels. We encourage the next Standing Commission for Social Justice and Public Policy to pursue this conversation about how to support formation and action in the local context.

## Budget

Our Commission's allotted budget for the 2013-2015 triennium was \$17,000. With no further meetings planned, and with no other expenditures, we currently have \$3,895.83 remaining. The Commission was blessed with almost full attendance at our meetings. Unfortunately, we were only able to hold two in-person meetings. For the next triennium, it is anticipated that the Commission should meet at least three times, so that the momentum of the work is not diminished. Therefore, the Commission requests a budget of \$24,000 to accomplish this work.

# STANDING COMMISSION ON STEWARDSHIP AND DEVELOPMENT

## Membership

Mr. Jamie McMahon, *Chair*, 2015  
Ms. Holly Bellows, *Vice Chair*, 2018  
The Rev. Grant Wiseman, *Secretary*, 2015  
The Rev. Canon Carol Cole Flanagan, 2018  
The Rev. Canon Dr. Lynn Collins, 2018  
The Rt. Rev. Edwin Gulick (2013-2014)  
Mr. James Huber, 2018  
Ms. Janette Huey, 2015  
Ms. Diane Mance, 2018  
Mrs. Elizabeth Moosbrugger, 2015  
The Rt. Rev. Lawrence Provenzano, 2015  
The Rt. Rev. Gregory Rickel, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
Mr. Paul Van Brunt, *Representative of the President of the House of Deputies*  
The Rev. Dr. James Simons, *Executive Council Liaison*  
Ms. Elizabeth Lowell, *Staff*

### *Changes in Membership*

The Rt. Rev. Gary Lillibridge (2014-2018)

### *Representation at General Convention*

Bishop Gregory Rickel and Mr. Jamie McMahon, Chair, are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To recommend policies that foster within The Episcopal Church a broad understanding of Christian stewardship, both individual and corporate. The Commission shall recommend strategies to General Convention for stewardship, including education, development, and planned giving, with special sensitivity to the cultural and linguistic diversity of the Church.

### **Meetings:**

- November 12-15, 2012 (St. Louis, MO)
- March 14, 2013 (Teleconference)
- July 18, 2013 (Teleconference)
- January 30, 2014 (Teleconference)
- March 20, 2014 (Teleconference)
- July 24, 2014 (Teleconference)
- September 11-13, 2014 (Bloomington, MN)

During the course of this triennium, the Standing Commission on Stewardship and Development focused on three priorities: actionable items whereby the Commission could see results outside of the legislative process of General Convention, support and advocacy for the Development Office of the Episcopal Church and for other fundraising organizations such as The Episcopal Network for Stewardship (TENS), and contextualizing the Church's views on good theology and practice of stewardship at all levels.

The Commission particularly wishes to note that its highest priority for this triennium is advocacy for the Development Office of The Episcopal Church. We feel that our Church is at a critical tipping point in its history with regard to fundraising at the broadest level, within and across its whole membership. If appropriate funding is not provided as part of the operating budget for the long term, this effort is unlikely to be successful, and the Church will lose out on the opportunity to tap into its most significant resources to raise funds for programs and endowment that will support our work well into the future. The Standing Commission on Stewardship and Development's support of the Development Office of The Episcopal Church cannot be overstated.

At our first face-to-face meeting, there was significant discussion regarding past resolutions proposed by previous incarnations of this Standing Commission and legislated by the General Convention, and it was noted that often they seem to have no long-term effect on the life of the Church. Without a mandate or canonical requirement for change, many resolutions seem simply to die as soon as Convention ends. Therefore, although recognizing that there will be certain resolutions that the Commission may wish to propose to the General Convention in 2015, members agreed to think about other activities that might allow for important outcomes during the triennium itself.

The first of these activities was a letter sent in December 2012 from the chair, on behalf of the whole Commission, to the presiding bishop, requesting that the chief development officer of The Episcopal Church be invited to share the current work of the Development Office annually at the spring meeting of the House of Bishops. The rationale for this was two-fold: first, given the \$4 million investment in the Development Office following General Convention in 2012, the Commission felt it was essential that bishops have a chance to learn about the work being done; and second, given the somewhat troubled history of the Development Office, that the chief development officer have the opportunity to meet with bishops individually and in small groups in order to build positive relationships.

The chair had conversations with several members of the House of Bishops Planning Committee regarding this request, and received a response from the presiding bishop in January 2013 indicating that she would do what she could to ensure regular communication with the House of Bishops about the work of the Development Office. The outcome was that Elizabeth Lowell was invited to present to the House of Bishops at their spring 2013 meeting, and representatives from the Development Office have continued to attend House of Bishops meetings since then.

The Commission's next action was a letter sent in December 2012 to the co-chairs of the Joint Nominating Committee for the Election of the Presiding Bishop requesting that candidates for presiding bishop share their last three tax returns with the Joint Nominating Committee as a part of the candidate's statement of stewardship and transparency. The Commission was very pleased to see significant language about stewardship and development in the final call for discernment and profile for candidates, which was issued in August 2014.

The final letter in this first phase of work was sent to the Joint Standing Committee on Planning and Arrangements (JSCPA) of the General Convention of The Episcopal Church in January 2013. It was a request that (consistent with resolution D065, discharged from the 2012 General Convention), the customary provide that an offering be taken at all Eucharistic services at General Convention with the beneficiary designated by Executive Council, and be articulated prior to General Convention. The Commission received a response to this letter from The Rev. Canon Michal Barlowe in February 2013 indicating that the Executive Committee of the JSCPA would consider the proposal and how it might inform the planning of worship and other activities at General Convention.

Following on from these activities, the Commission held a series of five teleconference meetings in 2013 and 2014 to work through other topics of interest. Significant discussion points to come out of the first face-to-

face meeting in 2012 included the possibility of adding a requirement about stewardship to the competencies for ordination, a discussion of past stewardship resolutions to have come out of the Standing Commission over the past several decades, and the need to have the same ethical standards for fundraising in the Church that are already codified in the secular nonprofit world. During these teleconference meetings, much progress was made by the Commission in understanding the background and current state of these areas of focus.

By the time of our second face-to-face meeting in September 2014, the Commission was well-prepared to work together on producing resolutions and other outcomes for the General Convention. At this meeting, we also invited The Rev. J.R. Lander, president of the Board of Directors of TENS, to join us both for his insight about the current state of stewardship in The Episcopal Church and to hear about the Board's plans for the organizational future of TENS.

In addition to the resolutions proposed below, the Standing Commission will publish an open letter or white paper to the Church regarding our support for the Development Office of The Episcopal Church. This letter, to be released in advance of General Convention, will spell out several challenges noted by the Commission during its work over the course of the triennium. The Commission does not believe that direct legislative action proposed by this body to the General Convention will be able to fix these challenges, since most are structural and may be impacted (or aided) by the ongoing work of the Task Force for Reimagining the Episcopal Church.

We note particularly that a lack of consistency with decision-making in defining priorities for fundraising has hampered development efforts over a number of years. A particular issue has been limiting the staff's work to just a few projects with which many potential donors are unable to identify as part of their experience in The Episcopal Church. In addition, it is important to note that the Development Office was set up and built with the goal of securing major gifts to support significant programs, not to raise annual fund dollars in direct support of the operating budget. The Episcopal Church already has an annual fund in the form of the diocesan asking.

In conclusion, the Commission believes that its time working together during the course of this triennium has been productive and, given the importance of stewardship and development to the ongoing life and mission of The Episcopal Church, we believe that this body should continue into the next triennium.

**PROPOSED RESOLUTIONS**

**AO88: SET RATES FOR DIOCESAN ASKING FOR THE EPISCOPAL CHURCH**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct the Executive Council to prepare, and the Program, Budget and Finance Committee of General Convention to present, a budget to the 79th General Convention in which diocesan commitments for funding the budget are set at a rate no higher than 15 percent for each year of the triennium (2016-2018); and be it further

*Resolved*, That the member dioceses of this Church commit to pay the full asking percentage as established by the budget approved by the 78th General Convention for the coming triennium; and be it further

*Resolved*, That the member dioceses of this Church commit to paying the full asking in the 2016-2018 triennium so long as that asking is no higher than 15 percent for each year of the triennium, with the expectation that the minimum commitment from every diocese of this Church shall be at the asked level no later than 2016; and be it further

*Resolved*, That those dioceses unable to make the minimum commitment by 2016 submit a hardship waiver request to Executive Council for review; and be it further

*Resolved*, That the Executive Council has authority to grant such a hardship waiver when accompanied by an action plan that will lead to full participation in the covenanted asking commitment by a set date.

EXPLANATION

The amount asked from dioceses for the General Convention budget has been at 21 percent beginning in 1997, dropping to 20 percent in 2011 and to 19 percent in 2012.

Since 1979, the General Convention has put forth resolutions regarding stewardship at a level significantly different from what is put forth in this resolution.

- In 1979 the Episcopal Church launched Venture in Mission, and awakened to our need to improve our stewardship.
- In 1982 we affirmed the tithe as the minimum standard of giving for individuals (A116), asked dioceses to establish stewardship committees (A117), and reaffirmed a concept of stewardship in responsible spending as well as giving (A120).
- In 1985 the Convention encouraged dioceses to assist congregations in planned giving (A149), and to accept the practice of giving to others as much as we spend on ourselves, known as 50/50 giving (D140).
- In 1988 dioceses and congregations were urged to continue work toward 50/50 giving, with at least 25 percent of the net disposable income (NDBI) of each Congregation to be given through the diocese for mission and ministry (D144s), which became the basis for the 21 percent asking to dioceses.
- In 1991 the Convention agreed to develop theological resources for 50/50 giving in the Decade of Evangelism.
- In 1997 the Convention's budget resolution (A209), based on the 50/50 goal, set 21 percent as the asking from each diocese in section 2.1.
- This was reaffirmed by the Convention in 2000 (A136), 2003 (D086), and 2006 (D079).
- In 2009, the asking continued at 21 percent, but the reference to 50/50 giving disappears from the text of the resolution.

Over the years, several dioceses have met and exceeded the asking of 21 percent. However, only 46.8 percent (52 out of 111) dioceses made a commitment of 18.5 percent or higher for the 2013-2015 triennium.

A strong mutual commitment to fund our common budget is essential for any plan to work. Encouraging full participation and holding one another accountable for our shared participation in the budget covenant we make at General Convention is a key component of this resolution. If the financial commitment by all dioceses of our Church had been at the 15 percent level in 2012, there would be \$1.5 million more than is currently pledged. That difference could be used to offset revenue not received due to approved hardship waivers.

By planning for a reduction to 15 percent during the triennium following the 78th General Convention (2016-2018), and by encouraging those who are able to give above the 15 percent level to do so, the General Convention will send a positive signal of support to dioceses as they seek to faithfully engage God's mission.

We pray that this change will allow those dioceses that have not been able to meet the previous asking to contribute their fair share to the mission and ministry entrusted to us, and that in the years ahead we will find a way together to increase our recognition of God's abundance and our giving for the spread of the kingdom.



**A089: APPROVE DONOR BILL OF RIGHTS**

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention approve the attached Donor Bill of Rights.

**Donor Bill of Rights**

Stewardship merits the respect and trust of the faithful, and so that donors and prospective donors can have full confidence in the Church and in causes they are asked to support, we declare that all donors to The Episcopal Church have these rights:

I. To be informed of the Church's mission of the way the Church intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II. To be informed of the identity of those serving on the Church's governing body, and to expect the body to exercise prudent judgment in its stewardship responsibilities.

III. To have access to the Church's most recent financial statements.

IV. To be assured that their gifts will be used for the purposes for which they were given.

V. To receive appropriate acknowledgement and recognition.

VI. To be assured that information about their donation is handled with respect and confidentiality to the extent provided by civil and canon law, specifically canon III.9.5(a)(2).

VII. To expect that all relationships with individuals representing church ministries of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the Church, or hired solicitors.

IX. To have the opportunity for their names to be deleted from lists that a Church may intend to share.

X. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

**EXPLANATION**

Stewardship is committing all that we have and all that we are to the greater glory of God once we say, "we believe." Becoming a people truly in touch with this reality makes us stewards of all of our resources: human, financial, material, and spiritual. At creation, God gave us responsibility for the care of the earth.

More than ever before, we are aware that what we do affects those in the next generations. We are created as stewards of God’s creation.

In order to protect the interests of both the Church and the donor, and to set standards of expectation for the donations made to the Church, the Commission recommends this Donor Bill of Rights, which is adapted from the Association of Fundraising Professionals (AFP) Donor Bill of Rights for nonprofit organizations. This document is accepted worldwide as the standard for professionals, volunteers, and all donors. The Commission has adapted this Bill of Rights to be in accord with the Canons of The Episcopal Church.

*Stewardship Statement of the Standing Commission on Stewardship and Development*

Luke 6:38: “Give, and it will be given to you. A good measure, pressed down, shaken together, running over, will be put into your lap; for the measure you give will be the measure you get back.”

Matthew 6:21: “For where your treasure is, there your heart will be also.”

God is our creator and has given us all that we are and all that we have. Stewardship is committing all that we have and all that we are to the greater glory of God once we say, “we believe.”

We are committed to the tithe of 10 percent as the minimum standard of giving for individuals. Some of us exceed 10 percent in giving, some of us tithe, and some of us are committed to reach the tithe. We are also committed to responsible stewardship of all we accumulate during our lives; most of us have made wills that reflect our commitment to the Church, and the rest plan to do so.

We invite our brothers and sisters in Christ to join us.

Ms. Holly Bellows  
 Mr. Paul Van Brunt  
 The Rev. Canon Carol Cole Flanagan  
 The Rev. Canon Dr. Lynn Collins  
 Mr. James Huber  
 Ms. Janette Huey  
 The Rt. Rev. Gary Lillibridge  
 Ms. Elizabeth Lowell

Ms. Diane Mance  
 Mr. Jamie McMahan  
 Mrs. Elizabeth Moosbrugger  
 The Rt. Rev. Lawrence Provenzano  
 The Rt. Rev. Gregory Rickel  
 The Rev. Dr. James Simons  
 The Rev. Grant Wiseman

## Budget

Budget for 2013-2015: \$16,000

Expenditures:

- Adobe Connect Licensing Fee (2013): \$425.00
- Adobe Connect Licensing Fee (2014): \$425.00
- Face-to-Face Meeting (September 2014): \$9,631.14

Total Expenditures: \$10,481.14

Unspent Balance: \$5,518.86

The Standing Commission on Stewardship and Development plans to meet once or twice during the next triennium. This will require a total budget of \$15,000 for the triennium.

# STANDING COMMISSION ON THE STRUCTURE OF THE CHURCH

## Membership

Mr. Thomas A. Little, *Chair*, 2015  
The Rev. Vanessa Glass, *Vice Chair*, 2018  
Ms. Joan Geiszler-Ludlum, *Secretary*, 2015  
Mr. J.P. Causey, 2015  
Mr. Vincent Currie, Jr., 2015  
The Rt. Rev. Martin Field, 2018  
Mr. Jack Finlaw, 2018  
Ms. Louisa Hallas (until 2012)  
The Rt. Rev. Don Johnson, 2018  
The Rev. Paul Lebens-Englund, 2018  
The Rt. Rev. David M. Reed, 2018  
The Rev. Bob Sessum, 2015  
Vacancy, *Executive Council Liaison*  
Mr. Alex Baumgarten, *Staff*

### *Representation at General Convention*

Deputy Thomas A. Little and The Rt. Rev. Martin Field are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, and Boards to determine the necessity for their continuance and the effectiveness of their functions and to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new Committee, Commission, Board or Agency, it shall, wherever feasible, be referred to the Standing Commission on the Structure of the Church for its consideration and advice.

**Meetings:** The Standing Commission on the Structure of the Church (“the Commission,” or “SCSC”) met in St. Louis, Missouri in November 2012 and in Chicago, Illinois in October 2014. In addition, the Commission met via video or telephone conference nine times. Detailed accounts of the Commission’s proceedings are available at the Commission’s web page on The Episcopal Church Web site: <http://www.generalconvention.org/ccab/roster?id=404>.

The Commission's specific assignments from the 2012 General Convention were Resolutions A122 (Financial Oversight and Budgeting Process); A076 (Strengthen Small Congregations); and D062 (Amend Canon V.3, Of Bodies of General Convention). In addition, the Commission devoted considerable attention to the ongoing work of the Task Force for Reimagining The Episcopal Church (TREC) pursuant to Resolution C095 from the 2012 General Convention.

Additionally, the Commission reviewed and continued some of its work in the prior triennium that continues to have relevance for the Church, namely diocesan viability and vitality, and Church structure “agencies” issues.

### **Review of Canonical Mandate**

The canonical mandate of the Commission is from Canon I.1.2.(n)(10):

(10) A Standing Commission on the Structure of the Church. It shall be the duty of the Commission to study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, and Boards to determine the necessity for their continuance and the effectiveness of their functions and to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new Committee, Commission, Board or Agency, it shall, wherever feasible, be referred to the Standing Commission on the Structure of the Church for its consideration and advice.

The Commission renews its support of the governance and polity assumptions and values expressed in its 2012 report (see the excerpts, below). The Church must adhere to these assumptions and values as it evaluates the performance and usefulness of its governance structures and processes. The Commission plays an important, ongoing role in holding the Church accountable these assumptions and values. In view of the many substantial changes to structure, governance, and polity coming from TREC, the Commission should play a critical role in the next two triennia.

The Commission’s ongoing review of, and reflection on, the materials published to date by TREC prompt it to recommend changing its canonical mandate to include “governance” and “polity.” These areas are implicit in “structures,” but it is desirable to make them explicit. Accordingly, the Commission recommends the following Resolution.

A097: AMEND CANON I.1.2(N)(10)

Resolved, the House of \_\_\_\_\_ concurring, That Canon I.1.2(n)(10) be amended to read as follows:

(10) A Standing Commission on the Structure, *Governance and Polity* of the Church.

It shall be the duty of the Commission to study and make recommendations concerning the structure, *governance and polity* of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, *Agencies* and Boards to determine the necessity for their continuance and the effectiveness of their functions and to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new Committee, Commission, Agency or Board, it shall, wherever feasible, be referred to the Commission for its consideration and advice.

EXPLANATION

The Resolution changes the Commission’s name to reflect the scope of the Commission’s work in fulfilling its mandate. Governance and polity issues are inherent in most changes to the Church’s structures. Other revisions are for consistency’s sake.

**Reflections on the Commission’s 2012 *Blue Book* Report**

In light of the 2012 General Convention’s passage of Resolution C095 establishing the governance reform — the Church reimagining task force that became the Task Force for Reimagining The Episcopal Church (TREC) — and in consideration of what TREC has published up to the date of this report, the Commission finds it important to review and reflect on its 2012 *Blue Book* report.

Fundamentally, the Commission stands by its 2012 assumptions, values, findings, and conclusions, particularly concerning the essential importance and role of the Church’s core governance elements — General Convention, Executive Council, and leadership from among all three Orders. We have faith that these structures and the people who lead and work within them should, can, and will discern and implement ways and means through which to make these governance structures more effective and more efficient in deploying God’s resources.

Portions of that report are reprinted below, followed by our reflections.

**Executive Council Resolution GAM-009**

At its February 2011 meeting, the Executive Council adopted Resolution GAM 009, directing the Commission to coordinate concurrent efforts by Committees, Commissions, and Task Forces regarding strategic planning and structural change. It directed the Commission to hold a consultation with the Joint Standing Committee on Program, Budget and Finance; the Joint Standing Committee on Planning and Arrangements; the Standing Commission on Constitution and Canons; the Budgetary Funding Task Force; the House of Deputies Committee on the State of the Church; and three of Executive Council's standing committees. It further asked for an interim report ten days later with recommendations and a timeline for implementation.

The Commission convened the consultation on May 30-31, 2011, to coordinate concurrent efforts by the represented interim bodies regarding strategic planning and structural change for the Church. At the conclusion of this consultation the Commission reflected on what was heard, synthesized central themes and concerns, and adopted a preliminary version of the following report to present to the Executive Council at its June 2011 meeting as recommendations for next steps. What follows is the Commission's final version of that preliminary report, which includes recommendations for eleven Resolutions.

Several working assumptions undergirded our deliberations:

- We agreed that the governance structure of The Episcopal Church is a representative, unitary government with the General Convention at its head.
- While the General Convention has ultimate authority and responsibility to determine structural and policy issues and to articulate a broad mission vision, the Church's structures disperse significant power and responsibility for carrying out mission to the diocesan level, and within each diocese, to the congregational level.
- Thus the structure is necessarily multi-layered and complex. To honor it well requires regular reassessment.
- We find no conflict between the hierarchical nature of the Church and the fulfillment of its mission at more local levels, when they have or can be provided with the resources for appropriate ministry responses.
- At its best, our structure embodies our values and provides for creative tension between institutional stability and fluidity for mission.
- We see as foundational the need to hold up the ministry of all the baptized, by striving to ensure that all voices have an equal opportunity to be heard.

The key values reflected in these assumptions are:

- the need for and expectation of innovation at every level coordinated with the giving and receiving of support among all levels;
- application of structural flexibility to better respond to God's call; and
- commitment to increasing diversity in the Church's governance. Using these values as a lens, and recognizing that they often don't overlap with current realities, we offer a number of proposals generated in our post-Consultation discussions.

We do not offer them as final answers to what a re-energized structure might look like; rather we want to assure that the right questions are asked so that all members of the Church can live out their baptismal ministries in a structure that honors effectiveness over efficiency and provides the stability necessary to support an atmosphere of flexibility and nimbleness for ministry and mission.

**Encouraging Subsidiarity**

We are called today in The Episcopal Church to witness and serve in a time characterized, in both the domestic and international parts of our body, by fast-changing needs of populations who are driven by experiences and values quite different from those of earlier generations and of each other. Yet we are one body as Paul teaches us, united by and in the love of God incarnated for us in Jesus Christ, whose values do not change. In this time of

social and cultural upheaval and widespread catastrophes of diverse kinds, how is this manifestation of the body of Christ called the Church able to respond? Clearly there is no single right answer to the pressing questions that present themselves daily to the Church. But we also know from Paul that the body has many parts, each with its own gifts and talents suitable to particular tasks, yet unable to say to any other part “I have no need of you.” Our challenge is empowering the best and most effective use of our gifts and talents in the circumstances that call out for action while also maintaining our unity as a body.

Because General Convention is the center of our structure, it creates and symbolizes our ecclesial unity, which is reinforced by the Book of Common Prayer in expressing and symbolizing our theological unity. Within that unity, authority to govern dioceses and congregations and to exercise the ministry of all the baptized is broadly dispersed making room for as wide a vision of ministry responses as human imagination, guided by the Holy Spirit and supported by other parts of the body, can devise. Still, hierarchy, and our history of clericalism, can be experienced as stifling innovation when the present times call for a plethora of local initiatives and experiments, which can be quickly conceived, executed, evaluated and, where appropriate, shared widely.

“Subsidiarity,” as applied to the Church, is a term that signifies the appropriate balancing between the unity of the whole and the roles and responsibilities of its parts, all working toward and measured against a sense of the good of the whole. In searching for that proper balance, decision makers must be attuned to the capacity for effective action at any given level, so that those stepping out in ministry are neither over-burdened nor under-burdened. General Convention — the Church gathered in its fullest embodiment — sets the parameters of “the good of the whole” through its resolutions, which are then turned into action by the several “members of the body” through their diverse ministries. Keeping true to the “good of the whole” requires reciprocal communication and assessment so that all parts may be held accountable by each other to those commonly identified parameters.

Since all the baptized are the hands and feet of Jesus, ministry must be empowered at the local level, whether diocesan or congregational, formal or informal. We recognize these local faith communities to be organic building blocks where members are formed for mission and service at the local, diocesan, provincial and Churchwide level. At the same time, we recognize that successful ministries at the parish level may depend on support and oversight from the diocesan level, and support for the parish from the diocesan level may depend on support from the province or from the Church Center. Facilitating communication and resource sharing, while still honoring local initiative, will be critical forms of support for maintaining the effectiveness of the several parts of the body as well as their awareness of being part of, and responsible to, the whole.

An outline of an answer is clear. Given the unitary structure set out in the Constitution from its earliest versions, governance of this Church and its relations with the Anglican Communion and other faith communities must be exercised at the level of General Convention. General Convention must also decide, through the Constitution and Canons, whether, when, and how to delegate or share governance responsibilities. General Convention may also describe a larger vision of Churchwide mission. Only the dioceses, however, can discern their particular piece of the larger mission vision in the circumstances in which they and their congregations find themselves. The consultation focused on the need to ensure that practices and organization of Churchwide structures, such as the Church Center, CCABs, provinces, General Convention, and the House of Bishops, do not become barriers to local innovation and effective ministry responses. The interrelatedness of all such entities requires any consideration of structural change to take into account the impact of a change in one area on the others. As part of this effort, The Episcopal Church must be mindful of local realities when setting Churchwide financial and administrative standards, particularly those that require dioceses and congregations to assume new costs.

The question of how the Church best honors and encourages local initiative raises other basic questions:

- At which level are the voices of all the baptized going to be heard most clearly?
- How can those voices be reflected at other levels?
- At which level are the ministries of the baptized going to be most fully realized and nourished?

- *At which level is the development of specialized or specific ministries most effectively supported?*

*We must also ask more practical questions:*

- *What tasks are most effectively performed at the congregational, diocesan, provincial, regional or Churchwide levels?*
- *Is the Church best served by a robust staff gathered in one location with Churchwide, specific programmatic responsibilities, or by a leaner central staff dedicated to ministries best pursued at the Churchwide level but working in tandem with other staff located at provincial or regional levels?*
- *Does our current headquarters building meet the Church's needs?*
- *Is the gathering of resources to meet particular needs of local and regional ministries best done on the Churchwide, regional or local level?*

*There are important policy questions as well:*

- *Do the Church's Constitution and Canons and the policies that guide our work encourage and support innovative ministry responses?*
- *Does our current formula for diocesan apportionment support the model of ministry we want to encourage?*
- *Do our current models of leadership reflect a commitment to encouraging initiatives?*
- *Where are we already successful in promoting risk taking and the search for creative solutions?*

The Commission has followed TREC's work closely, striving to be available for assistance when asked, but to not be perceived as horning in on the tasks assigned to TREC by General Convention. We believe the Commission has been successful in this regard. In its 2012 report, the Commission recommended that it be the oversight body for the Church's structure- and governance-reform efforts during the current triennium. General Convention instead enthusiastically established TREC for that purpose, giving it autonomy and a broad scope of work.

The Commission appreciates TREC's perspective and the boldness and vision with which it has pursued its goals. As noted earlier, however, the Commission reaffirms the importance and continuing validity of the assumptions and values declared in its 2012 report, and offers them as continuing guidance as the Church approaches the 78th General Convention.

Accordingly, and in the spirit of the 2011 GAM consultation and the TREC work, the Commission re-offers the following resolutions (A090 and A091 from 2012) to the 78th General Convention:

**A098: ENDORSE PRINCIPLE OF SUBSIDIARITY**

*Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention embrace the principle of "subsidiarity" as embodying a fundamental truth about effective ministry; and be it further*

*Resolved, That the Executive Council incorporate the principle of "subsidiarity" into its work, governance, and actions, measuring its decisions about where and by whom ministries will be conducted against the standard of what most advances the common good as identified by General Convention; and be it further*

*Resolved, That the Executive Council, in consultation with the Standing Commission on the Structure of the Church and other appropriate church bodies, undertake a thorough review and evaluation of whether current or proposed programs, staffing, offices, office locations (including 815 Second Avenue in New York City), provinces, and budgets are consistent with the principle of vigorously encouraging the exercise of any given ministry by the parts of this Church most appropriately gifted to undertake it; and be it further*

*Resolved*, That the Executive Council report its research, findings, actions, and recommendations to the 79th General Convention.

EXPLANATION

This resolution would endorse the principle of “subsidiarity” as defined within this report: “the appropriate balance between the unity of the whole and the roles and responsibility of its parts, all working toward and measured against a sense of the good of the whole”; and make it the yardstick that Executive Council uses to measure its work against in the future. It would also require the Executive Council to evaluate the administrative parts of our structure using the same yardstick, and to report back to the 2018 General Convention.

A099: REDUCE DIOCESAN APPORTIONMENTS

*Resolved*, the House of \_\_\_\_\_ concurring, That the 77th General Convention direct the Joint Standing Committee on Program, Budget, and Finance to reduce diocesan apportionments to allow more monies to remain at the diocesan, and thus parish and regional, levels to support greater encouragement of widespread, effective innovation.

EXPLANATION

To free up resources for more innovation in ministry at the diocesan and congregational levels, this resolution urges a reduction in the funding formula applied to dioceses.

**Viability and Vitality of Dioceses**

One of the Resolved clauses of Resolution 2009-A127 directed the Commission to study "the current diocesan configuration and suggest whether adjustments thereto would be appropriate." This mandate reflected the awareness that in 2009, several dioceses were struggling to support their bishops and a variety of active ministries given their limited resources. In many cases, those problems persist.

The Commission continues to see dioceses gathered around bishops as the iconic building block of any Anglican church and of The Episcopal Church. Thus, the effectiveness and vitality of dioceses is a key aspect of all our ministries. Our dioceses are diverse in many ways, including in geographic size, in number of congregations and clergy, in funding, and in organization and staffing.

Dioceses are also subject to changing circumstances as they grow or shrink and as the world around them changes. In some cases, decisions made on diocesan alignments years ago may not fit well the current environments in which those dioceses exist. Notwithstanding those changes, dioceses are communities of faith, and their histories and successes as communities should be respected and valued.

As the Commission discussed what might be desirable characteristics of a diocese, and models of diocesan effectiveness and vibrancy, it was obvious that the question, “What enables a diocese to thrive?” raises significant issues that are critical to the structure of our Church.

The Commission considered a data-driven survey to gather information to aid in developing some measures of diocesan effectiveness and vitality and, hence, viability. After considering a possible data-driven survey and after speaking with The Rev. Dr. Rob Voyle about his Appreciative Inquiry approach, the Commission abandoned its plans for a data-driven survey in favor of a more qualitative and forward-thinking approach to encourage creative ways to assess and enhance the vitality and viability of dioceses.

The Commission noted several developments that indicate positive attempts to focus creatively on the vitality and viability of dioceses, including:

- The juncture of the Dioceses of Chicago and Quincy
- The recent process of considering a possible juncture of the Dioceses of Eau Claire and Fond du Lac



- Ongoing study in the Diocese of Easton on a vision for that diocese
- The election of less-than-full-time Bishops or Bishops Provisional in several dioceses
- Partnerships formed between neighboring dioceses to meet common needs such as joint, localized, diaconal and presbyteral formation programs; sharing of Title IV officers; shared staff (communications, financial management, etc.); and shared formation events for laity and clergy, among other efforts at partnering.

The Commission applauds such creative, positive steps and encourages bishops and dioceses to continue to creatively seek ways to increase the vitality of their dioceses, even to the point of combining dioceses or certain diocesan functions. Sharing what bishops and dioceses are doing in this regard can help others deal with their own issues, and the Commission believes that communicating initiatives to increase the vitality of dioceses (and ensure their viability, where appropriate) can be helpful.

The Commission recommends the following resolution for consideration by the 78th General Convention.

**A100: ASSESS DIOCESAN VIABILITY AND VITALITY**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention encourages Bishops and Dioceses to prayerfully engage in a candid assessment of the viability and vitality of their Dioceses and to seek creative possibilities for enhancing the viability and vitality of their Dioceses, and be it further

*Resolved*, That the Standing Commission of the Structure of the Church support these efforts by developing and making available tools and processes for such processes and by facilitating conversations and communications about processes for increasing the viability and vitality of Dioceses.

**EXPLANATION**

This resolution encourages Bishops and diocesan leadership to engage in enhancing the viability and vitality of their dioceses, and charges the Standing Commission on the Structure of the Church with facilitating that work.

The Commission also considered provisions in the Constitution and Canons that might be obstacles to improving the vitality and viability of Dioceses. Two such possible obstacles were identified, as follows:

**Proposed Constitutional Amendment:** In reviewing the current provisions for reconfiguring dioceses, the Commission noted that the Constitution does not allow a diocese to take formation actions in the absence of a Bishop. This provision is well-founded, since a weighty decision by a diocese to combine the diocese with another diocese should not be taken without Episcopal leadership. However, an episcopal vacancy might well be a fertile time for a diocese to consider such a step, and avoiding the time and expense of a full election of a new Bishop could be both expeditious and financially prudent. The Commission concluded that when two dioceses are considering combining into a new diocese, their process should not be delayed by the absence of an elected bishop in one of them, provided that the Diocese has a Bishop who has provisional charge of that Diocese and can thus provide the appropriate episcopal leadership during the process.

The Commission therefore proposes the following Constitutional amendment to the 78th General Convention.

**A101: AMEND ARTICLE V.1 OF THE CONSTITUTION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention amend Article V, Section 1 of the Constitution to read as follows:

**ARTICLE V**

**Sec. 1.** A new Diocese may be formed, with the consent of the General Convention and under such conditions as the General Convention shall prescribe by General Canon or Canons, (1) by the division of an existing Diocese; (2) by the junction of two or more Dioceses or of parts of two or more Dioceses; or (3) by the erection into a Diocese of an unorganized area evangelized as provided in Article VI. The proceedings shall originate in a Convocation of the Clergy and Laity of the unorganized area called by the Bishop for that purpose; or, with the approval of the Bishop, in the Convention of the Diocese to be divided; or (when it is proposed to form a new Diocese by the junction of two or more existing Dioceses or of parts of two or more Dioceses) by mutual agreement of the Conventions of the Dioceses concerned, with the approval of the Bishop of each Diocese. In case the Episcopate of a Diocese be vacant, ~~no proceedings toward its division shall be taken until the vacancy is filled~~ a Bishop given the provisional charge and authority of the Diocese under the provisions of Canon III.13.1 may act under the provisions of Article V, Section 1. After consent of the General Convention, when a certified copy of the duly adopted Constitution of the new Diocese, including an unqualified accession to the Constitution and Canons of this Church, shall have been filed with the Secretary of the General Convention and approved by the Executive Council of this Church, such new Diocese shall thereupon be in union with the General Convention.

**EXPLANATION**

This resolution amends Article V, Sec.1 to allow a Bishop with provisional charge of a Diocese to participate in the Diocese’s approval of a plan to form a new Diocese by joining two or more Dioceses, or parts of them, without requiring the election of a Bishop to oversee the combining of the Dioceses.

**Proposed Canonical Amendment**

Canon III.12.4(a) requires that “each Bishop serving in a Diocese shall reside in that Diocese.” In at least one situation, two Dioceses have creatively elected a Bishop to serve in both Dioceses. This proposed amendment clarifies that in such a situation, the Bishop should have a residence in each Diocese.

A102: AMEND CANON III.12.4(A)

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention amend Canon III.12.4(a) to read as follows:

- (a) Each Bishop serving in a Diocese shall reside in that Diocese., *provided that, if a Bishop serves in more than one Diocese, the Bishop, with the concurrence of the Standing Committees of each Diocese in which the Bishop serves, shall reside in each of the Dioceses in which the Bishop serves.*

**EXPLANATION**

This resolution proposes to amend Canon III.12.4(a) to provide that a Bishop who serves in more than one Diocese must have a residence in each Diocese.

**Perspectives on the Structure and Vitality of General Convention**

The Commission spent considerable time during this triennium reflecting on the various TREC communications to the Church about ways to improve the efficiency and effectiveness of General Convention. The members of SCSC embrace the perspective that rule changes are needed to make General Convention more efficient and effective. For example, SCSC is open to a reduction in the number of legislative committees of General Convention and to rule changes that would allow resolutions to die in legislative committees.

The Commission also supports the use of communications technologies that would enable legislative committees to organize and begin the work of reviewing resolutions in the months leading to the convening of General Convention. This would allow legislative committees to begin hearing testimony on resolutions at the outset of General Convention and move legislation to the floor more quickly. Other ideas — such as providing for more joint meetings of the House of Deputies and the House of Bishops during General Convention, requiring that most resolutions to be considered by General Convention be filed by a date certain prior to the convening of General Convention, and streamlining the concurrence of resolutions process — are all supported by the Commission.

While recognizing that the General Convention must be enabled to perform its duties in the most efficient and effective manner, the Commission holds up and celebrates the fact that General Convention is at the center of our governance structure. It creates and symbolizes our ecclesial unity, which is reinforced by the Book of Common Prayer, the expression and symbol of our theological unity. Within that unity, authority to govern dioceses and congregations and to exercise the ministry of all the baptized is broadly dispersed, making room for as wide a vision of ministry responses as human imagination — guided by the Holy Spirit and supported by other parts of the body — can devise.

The Commission is not convinced that limiting the overall length of General Convention, or encouraging its evolution to become a general missionary convocation with networking and sharing around mission and ministries its primary focus, necessarily advance Church-wide mission and ministries. Certainly networking and sharing mission and ministries already are a significant part of the fabric of General Convention. But SCSC also sees that we advance church-wide mission and ministry through the legislative processes of General Convention. A historical review of the significant work of General Convention during the past few decades to lift up the ministry of all the baptized, and to help make The Episcopal Church a leader of inclusive and transformational ministries, supports the proposition that the legislative processes of General Convention are guided by the Holy Spirit and advance church-wide mission.

**A103: SCHEDULE LENGTH OF THE 79TH GENERAL CONVENTION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Joint Standing Committee on Planning and Arrangements schedule the 79th General Convention (2018) for not fewer than 10 days, in accordance with existing guidelines.

**EXPLANATION**

This resolution would direct planners for the 79th General Convention to follow the existing guidelines for scheduling General Conventions. The planning for the 78th General Convention (2015) is already completed.

**A104: CONSIDER BUDGET FOR THE 79TH GENERAL CONVENTION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Joint Standing Committee on Program, Budget, and Finance consider funding in the budget for 2016-2018 for the 79th General Convention to be at least 10 days.

**EXPLANATION**

This resolution would press the Joint Standing Committee on Program, Budget, and Finance to provide adequate funding for the 79th General Convention to last at least 10 days.

**A105: CONSIDER FINANCIAL ASSISTANCE FOR DEPUTIES ATTENDING THE 79TH GENERAL CONVENTION**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Joint Standing Committee on Program, Budget, and Finance consider establishing a fund for assistance for Deputies from dioceses with financial need, to be administered by the General Convention Office, to ensure that in each Diocese, at least two Deputies from each Order may attend the 79th General Convention.

**EXPLANATION**

Currently a “scholarship fund” exists to help bishops from dioceses with limited resources attend the meetings of the House of Bishops. This resolution would create a similar fund, administered by the General Convention Office, which enables such dioceses to provide broader participation by lay and clergy deputies at General Convention.

**The Future of Commissions, Committees, Agencies, and Boards**

The Commission sees a need to reform and reorganize the current CCAB structure in order to make these bodies more efficient and effective. The Commission values the CCABs as important vehicles for funneling the voices and concerns of the broader Church into General Convention for its consideration in setting mission priorities through budget and policy. The presiding officers who appoint the members of these interim bodies have been diligent in seeking a variety of voices to participate in this work. Interim bodies operate on a more manageable time frame for some who might not be able to make the commitment required by General Convention, and offer a structured and yet less formal context for learning about and contributing to the scope of General Convention and the mission and ministry of the Church.

The experience of members of SCSC who have served as members of various CCABs in prior triennia when in-person meetings were a more regular occurrence — as compared to the current triennium, when resources for in-person CCAB meetings were scarce — validates a concern that a lack of funding for CCAB meetings diminishes the opportunities for meaningful and productive work to be accomplished by these interim bodies.

The Commission has heard from members of the House of Bishops about how valuable their interim meetings are, and how important it is to their ability to do their work that they have regular, in-person gatherings. In-person CCAB meetings are similarly valued by bishops and clergy and lay deputies who serve the Church in this capacity.

To the extent that interim bodies are obedient to their mandates, they tend to work in silos, without established means of interaction with other interim bodies whose work may be of significance to their own assignments. The opportunities for communication and coordination presented by holding the organizing meetings of all CCABs in one place were important gifts to the CCABs in the last three triennia, enabling them to move more quickly into their substantive tasks and to establish connections that could serve them over the ensuing triennium. The joint initial meeting also offers savings in terms of staff time and travel by allowing several of the orientation and training goals for initial meetings to be handled in the larger group. The initial joint meeting should be funded in future triennia.

This is an appropriate place for the Commission to commend the important work completed by a subcommittee of the Executive Council’s Joint Standing Committee on Governance and Administration for Mission, addressing the identity, definition, and functions of “boards” in the Church. That subcommittee, assisted by Paul Nix, Esq., internal legal counsel at the Domestic and Foreign Missionary Society, achieved clarity around these issues and will assist whosoever continues to work on that end of Church structure and governance in the future. The Commission saw no need to recommend any specific action on this topic.

The Commission does recommend to the 78th General Convention the following resolutions on supporting the work of CCABs, derived from resolutions proposed by the Commission in 2012 that have continuing relevance and merit:

**A106: FUND INITIAL JOINT MEETING OF NEWLY CONSTITUTED CCABS FOLLOWING THE 78TH GENERAL CONVENTION**  
*Resolved*, the House of \_\_\_\_\_ concurring, That the Joint Standing Committee on Program, Budget, and Finance consider funding in the budget for 2015 for a joint meeting of the newly constituted CCABs following the 78th General Convention late in 2015 or early in 2016.

**EXPLANATION**

This resolution would provide funding for a joint meeting of all newly constituted Commissions, Committees, Agencies, and Boards late in 2015 or in early 2016 for shared orientation, training, and development of work plans for the ensuing triennium. This funding will only be necessary if such a meeting has not already been scheduled for the fall of 2015, using the remaining balances in the budgets of all Commissions, Committees, Agencies, and Boards from the current triennium.

**A107: FUND CCAB MEETINGS DURING THE 2016-2018 TRIENNIUM**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Joint Standing Committee on Program, Budget, and Finance consider including adequate funding in the 2016-2018 budget of the General Convention Office for at least two in-person meetings of each CCAB during the 2016-2018 triennium.

**EXPLANATION**

This resolution would provide funding for each CCAB to meet at least two times in addition to the joint initial meeting.

**A108: BUDGET FOR MID-TRIENNIAL WEB CONFERENCE OF INTERIM BODIES**

*Resolved*, the House of \_\_\_\_\_ concurring, That the Joint Standing Committee on Program, Budget, and Finance consider including \$5,000.00 in the 2016-2018 budget of the General Convention Office for a general mid-triennium, web-based meeting of no more than two representatives of each CCAB, or for one or more such meetings of appropriate representatives of CCABs whose work implicates a common topic, for the purpose of sharing the work each has undertaken and its progress on that work and for further coordination and cooperation where appropriate, with the meeting to be scheduled by the Executive Officer of General Convention in consultation with the two presiding officers.

**EXPLANATION**

This resolution (Resolution A099 from 2012) requests funding for a mid-triennium cross-CCAB meeting, or meetings, so that bodies with shared or overlapping assignments may learn about and from each other's work. The Church has had good success with web-based meetings at a low cost. TREC's September 2014 web-based hearing hosted at the National Cathedral demonstrated the impact these events can have. This resolution proposes a relatively small amount be allocated to employ similar technology for a cross-pollinating, virtual meeting of CCABs halfway through the next triennium.

**Resolution 2012-Do62: Publication of Membership of Church Bodies**

Resolution 2012-Do62 was not enacted in 2012, and was referred to the Commission for further review. The Commission took up the resolution and determined to propose that General Convention adopt the first portion of it, to require prompt public posting of the membership of all Church bodies, in the twin spirits of transparency and accountability.

**A109: AMEND CANON V.3**

*Resolved*, the House of \_\_\_\_\_ concurring, That Canon V.3 is amended by adding a new Section 1 and renumbering the existing Section 1 as Section 2:

### Canon V.3: Of a ~~Quorum~~ Bodies of General Convention

Sec. 1. *The General Convention Office shall publish the membership of all committees, subcommittees, task forces, panels, or other bodies elected or appointed by any body or leader throughout The Episcopal Church including, but not limited to, the House of Deputies; the House of Bishops; the Executive Council; and Standing Commissions, Committees, Agencies, and Boards of The Episcopal Church and their respective Presiding Officers and Chairs within 30 days after election or appointment.*

Sec. 4-2. Except where the Constitution or Canons of the General Convention provide to the contrary, a quorum of any body of the General Convention consisting of several members, the whole having been duly cited to meet, shall be a majority of said members; and a majority of the quorum so convened shall be competent to act.

#### EXPLANATION

The interim bodies of the General Convention accomplish a substantial amount of substantive work between regular meetings of General Convention. Publication of the membership of these bodies and assignment of the responsibility for publication reinforce transparency and accountability.

### **Resolution 2012-A122: Budgeting Process**

Resolution 2012-A122 asked that "the 77th General Convention direct the Standing Commission on the Structure of the Church to review, and recommend revisions to, Canons and the Joint Rules of Order regarding the financial oversight and budgeting processes of the Domestic and Foreign Missionary Society and The Episcopal Church."

This resolution emerged from apparent inconsistencies between canonical directives and those of the Joint Rules of Order, particularly regarding budgeting timelines and the functional relationship between the Executive Council and Program, Budget, and Finance both during the triennium and leading up to draft budget submission to General Convention.

Early in the triennium, a subcommittee of Executive Council's Joint Standing Committee on Finances for Mission (FFM) was established to address the budget process. Aably chaired by The Rev. Susan Snook and vice-chaired by Ms. Tess Judge, both members of FFM, the Subcommittee also included three other members of Council's Finances for Mission group, one member of its Joint Standing Committee on Governance and Administration for Mission, and two members each from the Church Center staff, the Standing Commission on the Structure of the Church, and the Joint Standing Committee on Program, Budget, and Finance.

The Subcommittee met by teleconference in November 2012, and by January 2013 had produced an improved draft budget timeline, which was perfected and presented to Executive Council for adoption at its February 2013 meeting.

The Commission wishes to commend the hard work and clear commitment to collaboration and transparency demonstrated by Executive Council's readiness to address these very real concerns head-on. The members of the FFM Subcommittee on Budget Process were a true delight to work with.

### **Amendments to the Budget Canons and Joint Rules of Order**

The Commission examined the Budget Canons and Joint Rules of Order, identified various conflicts and inconsistencies, and offers two resolutions to address these problems.

A110: AMEND CANONS I.1.8, I.1.11, I.2.6, AND I.4.6

Resolved, the House of \_\_\_\_\_ concurring, That Canons I.1.8, I.1.11, I.2.6, and I.4.6 be amended to read as follows:

**Canon I.1.8**

~~Sec. 8. The General Convention shall adopt, at each regular meeting, a budget to provide for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, the necessary expenses of the President of the House of Deputies including the staff and Advisory Council required to assist in the performance of the duties and matters related to the President's office, and the applicable Church Pension Fund assessments. To defray the expense of this budget, an assessment shall be levied upon the Dioceses of the Church in accordance with a formula which the Convention shall adopt as part of this Expense Budget. It shall be the duty of each Diocesan Convention to forward to the Treasurer of the General Convention annually, on the first Monday of January, the amount of the assessment levied upon that Diocese.~~

**Canon I.1.11**

~~Sec. 11. The Treasurer shall submit to the General Convention at each regular meeting thereof a detailed budget in which the Treasurer proposes to request appropriations for the ensuing budgetary period and shall have power to expend all sums of money covered by this budget, subject to such provisions of the Canons as shall be applicable.~~

**Canon I.2.6**

~~Sec. 6. The stipends of the Presiding Bishop and such personal assistants as may be necessary during the Presiding Bishop's term of office for the effective performance of the duties, and the necessary expenses of that office, shall be fixed by the General Convention and shall be provided for in the budget to be submitted by the Treasurer, as provided in the Canon entitled, "Of the General Convention."~~

**Canon I.4.6**

*(a) Starting no later than the second November following General Convention, the Executive Council or a committee thereof shall engage in discussions and meetings with the Joint Standing Committee on Program, Budget and Finance or a committee thereof to collaborate on the development of a proposed budget for the ensuing budgetary period; conduct outreach to the Church concerning the development of a proposed budget; and complete a report and proposed budget.*

~~(a b) Not later than 120 days prior to the next regular meeting of the General Convention, t The Executive Council shall submit to the Joint Standing Committee on Program, Budget and Finance the General Convention at each regular session thereof a proposed the B budget for † The Episcopal Church for the ensuing budgetary period, which budgetary period shall be equal to the interval between regular meetings of the General Convention, and shall transmit to the Bishop of each Diocese and to the President of each Province a statement of the existing and the proposed assessments necessary to support the proposed budget.~~

~~(b c) The budget proposed for adoption by General Convention shall include a €canonical and corporate portion which shall provide for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, the necessary expenses of the~~

President of the House of Deputies, including the staff and ~~Advisory Council of Advice~~ required to assist in the performance of the duties and matters related to the President's office, and the applicable Church Pension Fund assessments, and also the corporate requirements for the administrative support of the Domestic & Foreign Missionary Society offices.

(~~e~~ d) The budget proposed for adoption by the General Convention shall include provision for support for the P programs of ~~€~~ The Episcopal Church, ~~–The program so submitted~~ shall include a detailed budget of that part of the program for which it proposes to make appropriations for the ensuing year, and estimated budgets for the succeeding portion of the budgetary period.

(~~e~~) ~~After the preparation of the budget the Executive Council shall, at least four months before the sessions of the General Convention, transmit to the Bishop of each Diocese and to the President of each Province a statement of the existing and the proposed askings necessary to support the Budget for the Episcopal Church. The Executive Council shall also submit to the General Convention, with the budget, a plan for the askings of the respective Dioceses of the sum needed to execute the budget.~~

(~~d~~ e) Revenue to support the B budget for ~~€~~ The Episcopal Church shall be generated primarily by a single asking of the Dioceses of the ~~€~~ Church based on a formula which the General Convention shall adopt ~~as part of its Program, Budget and Finance process~~. If in any year the total anticipated income for budget support is less than the amount required to support the budget approved by the General Convention, the canonical portion of the Budget for the Episcopal Church shall have funding priority over any other budget areas subject to any decreases necessary to maintain a balanced budget.

(f) There shall be joint sessions of the two Houses for the presentation of the B budget ~~for the Episcopal Church~~; and thereafter consideration shall be given and appropriate action taken thereon by the General Convention. During the ensuing budget period, ~~€~~ the Council shall have the power to expend all sums of money covered by the budget and estimated budgets approved by the General Convention, subject to such restrictions as may be imposed by the General Convention, including but not limited to the canonical budget priority ~~declaration set forth in Section 6(d) of this Canon~~. It shall also have power to undertake such other work provided for in the budget approved by the General Convention, or other work under the jurisdiction of the Council, the need for which may have arisen after the action of the General Convention, as in the judgment of the Council reasonably reliable revenues ~~its income will shall warrant~~.

EXPLANATION

The budget provisions in the Canons and Joint Rules of Order are in conflict in important areas, mainly in the respective roles of Executive Council and the Joint Standing Committee on Program, Budget and Finance. While in the 2013-2015 triennium substantial improvements were made in the process for developing the triennial budget, amendments to the Joint Rules of Order and Canons are still in order.

A111: AMEND JOINT RULE OF ORDER II.10

Resolved, the House of \_\_\_\_\_ concurring, That Joint Rule of Order II.10 be amended to read as follows:

**II Joint Standing Committee on Program, Budget, and Finance**

**10. (a)** There shall be a Joint Standing Committee on Program, Budget, and Finance, consisting of 27 persons being members of the General Convention (one Bishop, and two members of the House of Deputies, either ~~€~~ lay or ~~€~~ clerical, from each Province), who shall be appointed not later than the fifteenth day of December



following each regular ~~M~~ meeting of the General Convention, the Bishops to be appointed by the Presiding Bishop, the Deputies by the President of the House of Deputies. The Secretary and the Treasurer of the General Convention and the Chief Financial Officer of the Executive Council shall be members *ex officio*, without vote. The Joint Standing Committee may appoint advisers, from time to time, as its funds warrant, to assist the ~~Joint Standing Committee~~ with its work.

**(b) Organization.** The Joint Standing Committee shall elect ~~its~~ a Chair from its membership, and such other officers as needed. The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the ~~B~~ budget, as well as Sections on Funding and Presentation, the size, ~~and~~ composition *and chairs* of the several Sections to be determined by the Joint Standing Committee. ~~The Chairs of each Section shall be elected by the Joint Standing Committee;~~ ~~†~~The several Sections shall elect their own Secretaries from among their own membership. The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; *Provided, however,* that final action the ~~B~~ budget shall be taken only by the full Committee, ~~either in~~ meeting assembled or by a vote by mail.

**(c)** During the interim between regular ~~M~~ meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose. Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof. ~~In~~ respect of the Budget for the Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by mail, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention. With regard to the General Church Program, the Joint Standing Committee shall:

- (i) Meet and consult with the Executive Council, ~~or its Administration and Finance Committee,~~ the appropriate committee thereof, on adjustments to the ~~€~~ church program priorities, and on alternate income generating resources;
- (ii) Receive from the Executive Council, ~~not less than four months~~ 120 days prior to the meeting of General Convention, the proposed General ~~€~~ church ~~P~~ program for the upcoming triennium, including a proposed detailed ~~B~~ budget for the year next following that of such Convention;
- (iii) Meet in such places as it shall determine, sufficiently in advance of the next General Convention to expedite its work;
- (iv) *Solicit church-wide comments and* ~~€~~ conduct hearings ~~upon such~~ the proposed ~~P~~ program and ~~B~~ budget; and
- (v) Consider ~~such~~ the Executive Council's proposed ~~P~~ program and ~~B~~ budget, *make any changes deemed necessary or advisable,* and report thereon to the next ~~succeeding~~ General Convention.

**(d)** Not later than the third day prior to the adjournment of each regular meeting of the General Convention, the Joint Standing Committee shall report to a Joint Session, pursuant to Canon, a proposed ~~B~~ budget for ~~†~~ The Episcopal Church for the ensuing *three-year* ~~Convention~~ period, ~~subject to the approval of the said Budgets subject also to increase, reduction, or elimination of items, based on open hearings held during the General Convention and by subsequent concurrent action by the House of Deputies and the House of Bishops.~~ *starting January 1 following that year's General Convention and ending the December 31 following the subsequent General Convention.*

**EXPLANATION**

The budget provisions in the Canons and Joint Rules of Order are in conflict in important areas, mainly in the respective roles of Executive Council and the Joint Standing Committee on Program, Budget, and Finance. While in the 2013-2015 triennium substantial improvements were made in the process for developing the triennial budget, amendments to the Joint Rules of Order and Canons are still in order.

**Emerging Church**

The Commission was fortunate to spend time in conversation with The Rev. Tom Brackett, Missioner, New Church Starts & Missional Initiatives, during our initial meeting in St. Louis in the fall of 2012. The following questions served as our starting point: What structural issues, if any, are impeding the emergence of fresh expression faith communities? And what structural fixes, if any, might better enable the emergence of fresh expression faith communities?

Through this conversation, we discovered that the primary inhibitors to the growth of new church forms are related to lack of financial resources and long-term diocesan commitment, and not necessarily structure. There are no obvious obstacles to fresh expressions within the Constitution and Canons of The Episcopal Church, which appear to leave sufficient room for our dioceses to incentivize and ease the work of developing new faith communities through creative canonical innovation.

For example, the Episcopal Diocese of Spokane, at its 2013 annual convention, adopted a canon for 'specialized missions,' which are committed faith communities that are formally connected to the Bishop, but that require far less financial and administrative overhead.

At the very least, the Constitution and Canons should be more thoroughly examined for any non-obvious obstacles to this type of innovation for mission and ministry and for appropriate canonical provisions to clarify the relationships of emerging church organizations with The Episcopal Church, dioceses, and congregations, including liability and tax-exempt status. The Commission encourages its successor members in the next triennium to take on this work, and urges other church bodies to explore and report on how to integrate and support emerging church forms and expressions within the structures and polity of our Church.

The Commission wishes to commend the excellent work of The Rev. Brackett to identify, network, and resource endeavors in fresh expressions across The Episcopal Church through the creative use of both online and regional face-to-face gatherings. We believe that this model of collaborative sharing and learning among local practitioners represents the best use of our wisdom and resources at each level of our common life.

**Goals and Objectives for the 2015-2017 Triennium**

The Commission expects that the next 78th General Convention will take action on many resolutions proposing governance and structural and administrative changes. The Commission has faith that it will still exist in the ensuing triennium, as its canonical mandate will be never more important than in that "post-TREC" environment. In that triennium, the Commission will be a critical asset to the Church, as those changes are made operational by analyzing the intended and unintended consequences and proposing appropriate legislation to address problems, oversights, and transition issues.

## Budget

The Commission met in person twice and by video or telephone conference call nine times; and expended \$10,793.84, leaving \$5,206.16 unexpended from its \$16,000.00 budget.

The Commission expects to meet a similar number of times in the next triennium. This will require a budget of \$13,000 for 2016 and \$13,000 for 2017, for a total of \$26,000 for the triennium.

# STANDING COMMISSION ON WORLD MISSION

## Membership

Ms. Sandra McPhee, *Chair*, 2015  
The Very Rev. P. Allister Rawlins, *Vice Chair*, 2018  
Ms. Trish Morck, *Secretary*, 2018  
The Rev. Daniel Appleyard, 2018  
The Rt. Rev. Gregory O. Brewer, 2018  
Canon Judith Conley, 2018  
Mrs. Angela Daniel, 2015  
The Rt. Rev. Robert Fitzpatrick, 2018  
Sra. Tania Jaramillo, 2015  
The Rt. Rev. John Smylie, 2018  
Dr. Charles Stewart, 2018  
The Rev. Irene Tanabe, 2015  
Ms. Charlene Turner, 2015  
The Most Rev. Katharine Jefferts Schori, *Ex Officio*  
The Rev. Gay Clark Jennings, *Ex Officio*  
The Rev. R. David Cox, *Representative of the President of the House of Deputies*  
The Rev. Nathaniel Pierce, *Executive Council Liaison*  
The Rev. David Copley, *Staff*

## Summary of Work

**Mandate:** CANON 1.1.2(n)(11) A Standing Commission on World Mission, whose members shall include persons broadly representative of jurisdictions outside the United States of America, as well as persons having direct engagement with and experience in world mission. It shall be the duty of the Commission to review and evaluate policies, priorities, and strategies for global mission, and to make recommendations regarding global mission to General Convention.

### Meetings:

- Nov. 12-15, 2012, St. Louis, Missouri
- Dec. 11, 2012, Teleconference
- Feb. 21, 2013, Teleconference (Adobe Connect)
- March 13, 2013, Teleconference (Adobe Connect)
- April 25, 2013, Teleconference (Adobe Connect)
- May 30, 2013, Teleconference (Adobe Connect)
- June 26, 2013, Teleconference (Adobe Connect)
- June 27, 2013, Teleconference (Adobe Connect)
- July 25, 2013, Teleconference (Adobe Connect)
- Dec. 11, 2013, Teleconference (Adobe Connect)
- May 7-10, 2014, Maritime Institute of Technology
- June 19, 2014, Teleconference (Adobe Connect)
- July 3, 2014, Teleconference (Adobe Connect)
- Nov. 16, 2014, Teleconference (Adobe Connect)

## **Purpose of the SCWM**

Covenant Committees:

- Facilitate and initiate the work and relationships of Covenant Committees
- The SCWM representative convenes meetings and prepares and presents reports to the SCWM and the General Convention
- Global Mission Engagement
- Support and encourage work of the Global Partnership Office (GPO)
- Advocate, encourage, and support the sending of Young Adult Service Corps volunteers (YASC) and Episcopal Volunteers in Mission (EVIM)
- Provide recommendations, guidance, and strategies to the GPO to advance its work
- Recommend the necessary funding for the GPO and the SCWM to achieve their respective responsibilities
- Networking
- Encourage networking within and between entities of The Episcopal Church (parishes, deaneries, dioceses, provinces, institutions, agencies) engaged in global mission
- Promote mutual and interdependent relationships with global partners around the Anglican Communion and ecumenical and interreligious partners or organizations, such as the United Nations
- Overview/Vision/Global Perspective
- Feel the pulse of the state and direction of global mission engagement across TEC
- To engage proactively in conversation with our global partners regarding the current and future direction of God’s mission within TEC and around the Anglican Communion
- Review and recommend policies and strategies regarding mission
- Be aware of, and in conversation regarding, new and emerging theologies of mission
- Challenge, inspire, and prioritize the global mission engagement of the Church

## **Global Mission Engagement**

The Standing Commission on World Mission has worked closely with the Global Partnership Office (formerly the Mission Personnel Office) and has supported and encouraged the GPO’s work. The Commission has continued to advocate for and support the sending of Young Adult Service Corps volunteers and Episcopal Volunteers for Mission with the purpose of strengthening and deepening relationships throughout the Anglican Communion, fulfilling our baptismal covenant to “seek and serve Christ in all persons.” It has also provided recommendations, guidance, and strategies to advance the GPO’s work and to nurture The Episcopal Church’s call and commitment to mission engagement, as well as to advocate for the necessary funding in order to accomplish their goals.

## **Protocols for the Episcopal Church Members of the Covenant Committees**

As recommended by the Standing Commission on World Mission at its meeting May 2014 in Lithincum Heights, Maryland:

1. Refer to GC 2012 Resolution A111 regarding members of Covenant Committees.
2. Meetings — A minimum one meeting per triennium in TEC’s Covenant Partner country.
3. The role of Global Partnerships Office staff is to assist with the administration and logistics in collaboration with General Convention Office, as well as to accompany the trip to the Covenant Partner.
4. The Global Partnerships Office, in conjunction with the Director of Mission, will manage the budget of the meetings.
5. To ensure the proper maintenance of records and documents, the Covenant Committee members will use the extranet for correspondence and minutes.

6. Over the term of service, it is expected that each member will create and maintain a relationship with the Covenant Partner and be actively engaged in nurturing that relationship on a regular basis.
7. International travel is expected of each Covenant Committee member at least once per triennium.
8. Each member is expected to review and be familiar with all available documents regarding the history and current status of the Covenant relationships.
9. During the Covenant meeting it is expected that members:
  - Be prepared to provide a report on the state of The Episcopal Church highlighting successes and challenges.
  - Review the Covenant agreement and recommend amendments as appropriate.
  - Discuss any developments with regards to the partnership priorities, current financial challenges, and strategies for self-sustainability.
  - Write a full report of the meeting prior to the end of the visit to be sent to the chair of the Standing Commission on World Mission.

### **Global Perspectives**

In addition to the above work of the Standing Committee, individual members of the SCWM attended a number of conferences that focused on World Mission in The Episcopal Church and the Anglican Communion. These included: Sandra McPhee and Dan Appleyard attended the Global Episcopal Mission Network Conference in Bogota, Columbia May 5-10, 2013; Dan Appleyard attended the Church of England's Changing the Shape of World Mission, the 2013 Partnership for World Mission Conference November 5-7, 2013 at the Hayes Conference Center in Swanwick, England; and Sandra McPhee was able to attend the 2014 Partnership for World Mission Conference, again in Swanwick, England November 19-21, 2014. There were significant and creative discussions about the financial sustainability and economics of mission ministries, and about the changing paradigms and new horizons of collaborative World Mission.

### **Report of the meeting of the Joint Committee on Provincial Companionship: The Episcopal Church (TEC) and The Episcopal Church in the Philippines (ECP)**

Dates: April 7-8, 2014

Where: Eugenio Lopez Center, Metro Manila

Present from TEC: David Bailey (Executive Council and Bishop of Navajoland), Robert Fitzpatrick (SCWM and Bishop of Hawai'i/Micronesia), Peter Ng (TEC Staff), Winfred Vergara (TEC Staff), Bruce Woodcock (CPG), Ashley Cameron (YASC), Margaret Clinch (YASC), and Andrew Joyce (YASC)

Present from ECP: Renato Abibico (Bishop of Northern Luzon), Louis Yacuan (Priest in North Central Philippines), Mary Bacwaden (Lay Representative from Northern Philippines), Laura Ocampo (ECP Staff – Episcopal Care Foundation), Floyd Lalwet (ECP Staff – Provincial Secretary), and Edward Malecdan (Prime Bishop)

The group reviewed the relationship between TEC and ECP, giving special attention to the fact that the ECP is completely financially self-sustaining. The ECP has taken Assets Based Community Development as a central element in mission and organization. It was noted that for most “ordinary” natural disasters, ECP is capable of responding to the needs of the people.

Cases of “Super Typhoons” (such as Haiyan/Yolanda) and other catastrophic disasters still require an international response, as is the case wherever they happen in the world. “From past experiences, disaster relief and rehabilitation work ... oftentimes results in helplessness,” wrote Floyd Lalwet, ECP Provincial Secretary, in the proposal describing the Church’s planned disaster response. “Hence, in the implementation

of this project, measures are deliberately and programmatically adopted to prevent such undesired effects and, instead, build up and/or enhance the sense of self-reliance of these communities.” The Church’s response to the devastation from Haiyan/Yolanda is largely in areas of the Philippines, where heretofore the ECP has had little or no presence.

Attendees discussed enhancing the partnership. The presence of young adults from the Youth Adult Service Corp (YASC) was very positive. The question was raised of whether young adults from the Philippines might serve in parts of The Episcopal Church. The desire for companion dioceses was again discussed, but the ECP leadership wanted to be clear that they want relationships of mutuality, and not ones of receiving money or dependency. The tri-diocese exchange of Navajoland, the Northern Philippines, and Yokohama (Japan) was highlighted. There was discussion of theological education and possible sharing. There was particular hope about the possibilities between St. Andrew’s Theological Seminary and the Church Divinity School of the Pacific.

No resolutions came out of the gathering. The TEC representatives are keen that TEC and other Covenant partners learn about the ECP. There has developed a relationship of equals in the TEC-ECP partnership. It was suggested that if there is a parent and child relationship, it is that of a fully self-sufficient adult child of a proud parent. This relationship must be nurtured and shared.

**Report of Meeting of the IARCA Covenant Committee to SCWM, March 12-13, 2014, Iglesia Episcopal Diócesis de Panamá**

Attendees:

- Representantes de IARCA
- Reverendísimo Armando Guerra, Iglesia Episcopal de Guatemala, Primado de IARCA
- Reverendísimo Julio Murray, Iglesia Episcopal de Panamá
- Reverendísimo Héctor Monterroso, Iglesia Episcopal de Costa Rica. Secretario General de IARCA
- Reverendísimo Martin Barahona, Iglesia Episcopal Anglicana de El Salvador
- Reverendo Harold Gustavo Dixon Reynales, Diócesis de Nicaragua
- Licenciado Marco Austin, Diócesis de Panamá, Presidente Comité de Convenio
- Representatives of TEC
- The Rt. Rev. Susan Goff, Episcopal Diocese of Virginia — House of Bishops, TEC
- The Rev. Michael Dresbach, House of Deputies, TEC
- Charles Stewart, SCWM — TEC
- Coromoto Jiménez de Salazar, Executive Council — TEC
- The Rev. Glenda McQueen, Officer, Latin American and the Caribbean, Staff TEC
- The Rev. Bruce Woodcock, Church Pension Group

The following is a short summary taken from notes and the official minutes. Note that the covenant agreement has been in force for 15 years and will continue for two more.

TEC made a joint presentation using talking points from a PowerPoint slide deck prepared by Chuck Stewart. Main points of TEC’s presentation were:

- Overview of TEC budget, including how the budget is developed. Budgets are developed entirely differently in IARCA. (My impression is that the bishop generally develops and publishes it.) One of the points we wanted to emphasize is that the covenant committee had very limited ability to affect the budget numbers.
- Recent litigation in TEC
- Update on the Task Force for Reimagining the Episcopal Church
- Update on election of the Presiding Bishop
- Increase in ministry in Latin@, Asian and African communities

- YASCers in Central America
- Perceived increase in short-term missions

The presentation engendered a lot of discussion, including about how the two provinces could work together more effectively. The bishop of Costa Rica expressed thanks and said this was the first time he felt as if TEC cared about IARCA.

Bishop Murray introduced the two YASCers who are working in Panama; they gave an excellent presentation on their work. Noting that there are no YASC people assigned to Guatemala or Nicaragua, the group discussed how the assignments are developed and how people are assigned.

The bishops of the five dioceses (The Rev. Dixon speaking for Nicaragua) gave extensive reports on the activities in their dioceses and the state of the Church there. Details can be provided to interested persons.

The joint committee agreed to spend the rest of the meeting evaluating in detail each paragraph of the covenant agreement. Marco, who was president of the joint committee and is a lawyer, opined that there was no mechanism by which to force compliance if either party were out of compliance. Details of the discussion can be provided to interested persons.

There are apparently two — perhaps more — drafts of the covenant extant, with some non-trivial differences. No one is sure which is the official and final version. There are also differences between the meaning of the English and Spanish versions. Bruce Woodcock apologized for this and some other problems that occurred, he said, due to changes in the administration at TEC.

Concerns:

- Differences in texts of drafts of covenant agreement
- Funding cuts
- Uncertainty on whether TEC committed to additional funding for certain programs
- Change in committee members
- Acceptance and seat in House of Bishops of TEC

Agreements:

- TEC covenant committee members will lobby in TEC to hold the 2016-2018 number to be the same as the 2013-2015
- Both sides have failed to keep to their commitments
- CPG has done a good job in and for IARCA

The Rt. Rev. Susan Goff was elected president for the next triennium. We will meet again in Guatemala in April 2016. Sadly, funding does not allow us to meet sooner — which we should.

**Report of the Liberia Covenant Committee, March 4, 2014**

The Liberia Covenant Committee met in Liberia February 25-March 4, 2014. There are four members of the Covenant Committee from The Episcopal Church: Sandi McPhee, Chair of the **Standing Commission on World Mission**; Liza Anderson, a member of The Episcopal Church's **Executive Council**; The Right Rev. Mark Beckwith, Bishop of Newark, representing the **House of Bishops**; and The Rev. Theodora Brooks, Deputy to General Convention, representing the **House of Deputies**.

They were assisted by the Reverend Ranjit Mathews, **Officer for Global Relations and Networking** for The Episcopal Church (TEC); and by The Rev. Canon Bruce Woodcock, Manager for International Relations and Pastoral Care for the **Church Pension Group** (CPG) and Honorary Canon of Trinity Cathedral in Monrovia (2008). This was Sandi McPhee's third visit to Liberia, Bruce Woodcock's 15th (since 1977), Mark Beckwith's



second (the first was in 1972 for a week as a college student), and Ranjit Mathews' and Liza Anderson's first visit. Theodora Brooks is a native Liberian.

The returning members of the Covenant Committee repeatedly made mention of visible restoration since their visit three and five years ago in the country in general and in The Episcopal Church in particular. Once-unfinished projects have been completed, run-down church and school buildings have been renovated, and there is a spirit of new life in the diocese. That said, the leaders of diocesan organizations and committees (listed on the agenda) were clear, frank, and realistic in their reports to us. There are significant financial challenges ahead in virtually every area of ministry.

There is disappointment on the part of the bishop and leadership of the Episcopal Church of Liberia about The Episcopal Church's not having lived up to its financial commitment as outlined in the 2009 Covenant. The signed agreement indicated that The Episcopal Church would reduce its allotment to the Episcopal Church of Liberia by 5 percent a year, beginning in 2010, with a starting figure of \$215k.

Following that trajectory, the Episcopal Church of Liberia should have received approximately \$185k in 2013. Instead, only \$122k was given. The Covenant Committee shares this disappointment and apologizes for The Episcopal Church's role in not meeting its commitment. The members of the Covenant Committee commit to work within the official structures of The Episcopal Church to restore this funding.

The Covenant Committee was deeply impressed with the openness and honesty that our Liberian partners demonstrated with respect to financial circumstances in the Episcopal Church of Liberia. We were impressed with the commitment, faith, and hope that were evident in every place we visited — qualities that had persisted in the face of the crushing disappointments experienced during the civil war. The Episcopal Church of Liberia has much to teach The Episcopal Church, and indeed the rest of the world, about what belief in the Resurrection can produce.

Our goal in moving forward is to build on the 2009 covenant and to create a working document together that we will revisit regularly. We wish in particular to highlight our renewed commitment to section E of the covenant, which states that we agree to "encourage and nourish companion diocese relationships and other means for grassroots sharing of human, spiritual, and material resources." We agreed that we would focus our work together in three primary areas:

- Education
- Partnerships
- Finance

**Education**

Currently there are 29 Episcopal Schools in Liberia, and one Episcopal University (Cuttington University, founded in 1889). Since the end of the war in 2003, Episcopal schools are experiencing significant challenges collecting student subsidies from the government. Also since the war, salaries for public school teachers have remained steady (and some have gone up), while salaries for teachers at Episcopal Schools have gone down. The result is that Episcopal schools are having difficulty retaining teachers.

The Episcopal Church has a reputation for providing the best education in Liberia. Cuttington University has long been ranked the top university in Liberia. The Episcopal Church of Liberia is strategizing about how to build more relationships with the Liberian government, and Cuttington has been developing relationships and exploring new ventures with educational institutions abroad.

Many parishes in the Episcopal Church of Liberia sponsor schools. The commitment to provide both vocational and academic training is deep and longstanding. The Episcopal Church of Liberia is actively

seeking partnerships both within Liberia and among congregations and organizations in The Episcopal Church.

### **Partnerships**

The Committee sees its ongoing role as encouraging partnerships. Such partnerships may include, but are not limited to, the following examples:

- Parish-to-parish relationships between The Episcopal Church and the Episcopal Church of Liberia
- Partnerships with bishops in The Episcopal Church. Bishop Hart is coming to the House of Bishops meeting in March 2014. Bishop Beckwith has agreed to facilitate conversations with bishops in The Episcopal Church whose diocese includes congregations that have been involved with the Episcopal Church of Liberia.
- With the Liberian Episcopal Community in the USA (LECUSA)
- With major donors, although we understand that this is a slow process.
- With Episcopal Relief and Development
- With the Presiding Bishop of The Episcopal Church and with appropriate church-wide staff
- Between Cuttington University and academic leaders
- Between the Episcopal Church Women in Liberia and their sisters in The Episcopal Church
- Between youth and young adult organizations in the Episcopal Church of Liberia and The Episcopal Church.

In order to facilitate these partnerships and to continue to strengthen our relationships with one another, the members of the Covenant Committee intend to be in regular communication with each other between now and our next anticipated meeting at General Convention 2015.

### **Finance**

The Covenant Committee received extensive reporting on the financial state of the Episcopal Church of Liberia as of March 1, 2014; and noted that additional information would be forthcoming upon the return of the Diocesan Treasurer Mrs. D. Sheba Brown (who was out of the country on business in Mali for the National Bank of Liberia) and Mrs. Juanita Neal, Chair of the Board of Trustees, Episcopal Diocese of Liberia, who was traveling in India. The Committee noted progress made since the 2009 covenant report in improving the financial planning and oversight of diocesan programs and in property management. It also initiated a conversation about the status of investment funds held for Liberia by the Domestic and Foreign Missionary Society (DFMS). Areas of significant development, which were witnessed and applauded by the Committee, include:

- Sustainability
- Property Management
- Investment Funds, the status of which the Committee also extensively discussed.

### **Sustainability**

Committee members learned of steps taken by the Episcopal Church of Liberia to establish clear and measurable economic objectives. Every parish is now asked to pay to the diocese an annual assessment, or quota, which represents 5 percent of the net operating budget of the parish. The members of the Committee also learned that the diocese tracks the successes that have been achieved in meeting the objectives of the ECL budget. This helps to enhance the financial support for the diocese, the local churches, and communities.

Entrepreneurial leadership training was held for all clergy in 2011 at Cuttington University. It was hoped that the Planning and Development Board, with the support of Episcopal Relief and Development, could continue to train parish leadership to create, manage, and maintain parish-based agricultural, fishing, and other programs for income generation in order to support parish and congregational development.

The discussion of strategic planning includes the exploration and expansion of "parish-to-parish" administration guidelines to assure coordination in the United States for the collection and shipping of donated materials, for the clearing and distribution to designated recipients, and for reporting follow-up (perhaps with LECUSA and other companion support groups in the United States). We agree that this is necessary work, but the appropriate person to coordinate it has not yet been identified.

### **Property Management**

The members of the Covenant Committee witnessed that the Diocesan Center has been moved from downtown to Sinkor in order to enable the extension and expansion of the lease of the office building at Ashmund and Randall. This enabled the installation of a new elevator by the ECL; an increase in rent for additional floors now being used by the National Oil Company of Liberia (on a year-to-year lease); and improvements to the leased property at the Jean Travis building, which was fully renovated under a long term lease agreement. The diocese has not written off the long-term loss of rental income from the Liberian government (1979-2009) estimated at more than US \$4 million, and now plans to go to court to sue for payment.

Options are being explored to lease the new office building at the Diocesan Center in Sinkor. The renovation of the unfinished apartment complex there has been negotiated and signed in a long-term lease agreement with a Roman Catholic education agency based in Lebanon, which will build and operate a school using the old bishop's residence and the unfinished apartments next to the beach.

Finally, the use of a downtown property owned by the Episcopal Church of Liberia near the cathedral is likewise under study, perhaps to be used for a car park in the short term and for the construction of a high-rise building in the long term.

Areas of concern that were discussed and noted for ongoing conversation and follow-up include the following:

- Diocesan Administrative Assistance: Oversight and Management. (Possibility of a missionary appointment in this area?)
- Pension Plan: Long-term financial viability (technical assistance with a study for a valuation of a defined-contribution plan versus a defined-benefit plan)
- Covenant Funding Status (Reviewing the 2009 Budget and Actual DFMS Funding for 2010-2014). Executive Council should make note of the unintentional error in the General Convention triennial budget process, and is asked to restore the funding that was agreed to in the covenant. (It should be noted that this is also an issue for The Episcopal Church's other covenant committees.)

### **Investment Funds**

Trust Funds established for the Diocese of Liberia between 1857 and 2014, held and invested on behalf of the Diocese of Liberia by the DFMS, were reviewed; and the following categories were identified for recommendations to be made to the Executive Council of The Episcopal Church and to the 2016 diocesan convention of the Episcopal Church of Liberia:

- Endowment
- Restricted Funds: Income Education & Scholarship
- Diocesan, Education, Hospital, and Special Programs Support (pending reallocation approval)

Market values on all funds are from 09/30/2013:

**Endowment Fund A** [Income requested for local re-investment/use] = \$1,421,930

Class One: #853 990,475 [Income from this fund has been approved by Executive Council in February 2014]

Proposed purpose of the following Class Nine funds: Endowment

Class Nine: # 1 123,720  
 #555 32,075  
 #589 33,441 [Income available to Bishop pending allocation]  
 #868 242,219  
**Total: \$1,421,930**

**Endowment Fund B** [Income restricted pending allocation discussion w/CUC] = \$1,305,894 Income from these funds has been distributed to Cuttington University since 1985.

Class Twenty-Six:

#844 819,787 [Income allocation for CUC (and Church of the Province of West Africa/ECL)]  
 #892 478,757 [Released for use by ECL after 2009 with CUC approval]  
 #735 7,350 [Income available for CUC/Church Program]  
**Total: \$1,305,894**

**Restricted Income: Education/Scholarship Support** = \$335,373

Class Nine: #67 9,153 [Reallocated for Education]  
 #104 5,756 [School Support]  
 #515 14,667 [School Support – Maintenance St. John’s Cape Mount]  
 #280/622 185,117 [Girls Education/School Support –Bethany/Bromley]  
 #74 17,545 [Scholarship – St. John’s Cape Mount]  
 #113, 257, 259, 599 29,841 [Girls Scholarships]  
 #141, 152, 153, 300, 341, 419 73,278 [Scholarships]  
**Total: \$335,373**

**Other Restricted Income Allocations** = \$126,269

Class Nine: # 351 38,423 [Income Restricted: Support of Bishop/Office]  
 Class Twenty-Six:  
 #556 25,371 [Income Allocation: Hospital Fund]  
 #893 62,475 [Income Restricted: Support of CUC President/Office]  
**Total: \$126,269**

**Diocesan Program Investment** – Suggested for Reallocation = \$178,665 [w/Class 26 = 216,105]

Class Nine: #37 3,454 [Income to ECL/Boat Fund]  
 #91 66,886 [Available for Reallocation: Education/Religious Work]  
 #112 14,647 [Available for Education]  
 #373 4,783 [Available for Children]  
 #423 5,061 [1/2 of 10,000 fund split with Alaska]  
 #433 7,666 [1/2 to be divided with the Episcopal Church in the Philippines]  
 #458 22,887 [Available For Education]  
 #483 38,779 [Available for Reallocation – Gender program]  
 #577 10,768 [Available for School/Church Construction]  
 #735 3,734 [Available for Technical School/Cape Mount]  
**Total: \$178,665**

Class Twenty-Six:

#588 19,599 [Income available for Bishop pending appropriation]  
 #688 17,841 [Hospital/Children's Program with approval of Presiding Bishop and DFMS Treasurer]  
**Total: \$37,440**

The Episcopal Church has an enormous amount to learn from the Episcopal Church of Liberia. The Episcopal Church of Liberia has good understanding of steps needed to promote sustainability — specifically, entrepreneurial leadership development, strategic planning, and financial management. The Episcopal Church of Liberia is ahead of The Episcopal Church in this regard. Members of the Covenant Committee are committed to doing whatever they can to foster a mutual, life-giving relationship.

We hope that the relationship between The Episcopal Church and the Episcopal Church of Liberia continues. We are proud of the historical relationship between our two churches, which dates back to 1837. However, the ultimate foundation of our work is our mutual relationship with Jesus Christ. We hope that our relationships with one another in Christ will continue to develop as we work together to further God's mission in the world.

In peace, gratitude, and friendship,  
 Mark Beckwith  
 Sandi McPhee  
 Theodora Brooks  
 Liza Anderson  
 Bruce Woodcock, *Ex Officio*  
 Ranjit Mathews, *Ex Officio*

**PROPOSED RESOLUTIONS**

**A112: ENCOURAGE SUPPORT FOR YASC AND EVIM**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church encourage dioceses, seminaries, and parishes to recruit and support both Young Adult Service Core members (YASCers) and Episcopal Volunteers in Mission members (EVIMs), continuing General Convention’s commitment to increasing numbers of YASCers (30 for 2016, 40 for 2017, and 50 for 2018) and EVIMs (10 percent increase per year).

**EXPLANATION**

YASCers are valuable in developing relationships with global partners and for what they bring back to the communities from which they came. Likewise, EVIMs are important servants of the Church, as they bring their experience and expertise to the places where they are received, and bring the global Church back to their communities.

**A113: CONTINUE DEVELOPMENT OF GLOBAL MISSION MAPPING PROJECT**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of the Episcopal Church encourage the Office of the Presiding Bishop and the Executive committee to continue the development of the Global Mission Mapping Project.

**EXPLANATION**

The democratization of the Church’s mission has led to parishes, dioceses, and organizations to engage directly in mission. Thus there is a need for networking and collaboration in TEC for global mission activities; for easily accessible, interactive information indicating existing relationships between various global partners; and better communication and networking throughout the Church on mission-engagement activities.

**A114: HONOR COVENANT AND BILATERAL AGREEMENTS**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention of The Episcopal Church, in continuing to honor its financial and other commitments undertaken as part of its covenant and bilateral agreements with other provinces and dioceses of the Anglican Communion, will not reduce those financial

commitments in any general, percentage-based reduction of the budget of the General Convention; and be it further

*Resolved*, That if these covenant and bilateral agreements permit, and if financial exigencies require a reduction in funding by the General Convention or Executive Council, consultation and notice of any reductions will be made immediately to our covenant or bilateral partners as well as to the members of the covenant or bilateral committees; and be it further

*Resolved*, That the policy of The Episcopal Church is to honor fully our financial commitments under our covenant or bilateral agreements.

**EXPLANATION**

Until the past two trienniums, The Episcopal Church has always fully honored its financial commitments as stated in its covenant and bilateral agreements with other provinces and dioceses of the Anglican Communion (Liberia, IARCA, Brazil, Philippines, and Mexico.)

In several instances, our mission partners were not informed of reductions and were surprised by unilateral actions of The Episcopal Church. Such actions, without consultation and in apparent violation of some of the agreements, may damage our relationships with our mission partners. This resolution rearms our commitments, and makes clear that our policy is to meet our financial commitments fully — and in those extraordinary circumstances when a reduction may be required — that we will consult and inform our partners about such actions. There is still rationale for continuing these commitments:

- a) IARCA – \$1,436,856 for the 2016-2018 triennium
- b) Liberia – \$366,369 for the 2016-2018 triennium
- c) Mexico – \$620,964 for the 2016-2018 triennium
- d) TEC needs to understand the ramifications and the result of its actions in 2009 concerning allocations for the Covenant Partners

**Goals and Objectives for 2016-2018 Triennium**

While the future of the Standing Commission on World Mission is unclear, pending results of the TREC report to General Convention, members of the Commission hope and pray that the foundations of the multiple global relationships that have been strengthened by many years of compassionate work will remain solid.

A full and thoughtful reading of this report will indicate that the work of sustaining current relationships and building new ones requires far more than the sincere and dedicated efforts of a subcommittee; it requires some continuity in terms of leadership and strategy — the kind of continuity offered by a Commission consisting of both lay and clergy members who are intentionally committed to world mission.

The level of trust that has been established through the years by the work of SCWM should be strengthened, especially in this time of world turmoil, rather than weakened by severe change that may not be clearly understood by our global partners. That being noted, the SCWM is moving forward with goals to enhance work that has already begun, to restore trust that has been eroded by promises that have not been kept, and to capitalize on the vital interest in mission work that youth and young adults are displaying.

The SCWM plans to move forward with:

- Preparation of a publication of best practices for short-term mission groups, including valuable and practical information from those who have led or participated in such activities;

- The design and implementation of a significant program/conference/training to walk alongside Covenant Partners as they move towards self-sustainability;
- The continuation of attendance at global partner mission conferences as funds allow; and
- The networking and coordination of global mission activities across TEC.

## Budget

For the 2013-2015 triennium, the Standing Commission on World Mission was allotted \$16,000.

1. Lack of funds has seriously impeded this Commission's work, such as:
  - a) Covenant Partners meeting — A110 (GC 2012) has precedent from 2007 or 2008, when Covenant partners attended part of the Executive Council meeting and then met with the SCWM.
  - b) Inability to meet in Cuba or other non-US site, limiting the Commission's ability to meet personally with global partners.
  - c) Lack of face-to-face meetings; does not help the productivity of the group; has limited usefulness.
  - d) Attendance at global mission conferences came out of attendees' personal funds, thus limiting representation.

To meet its programmatic and policy-making responsibilities, the Standing Commission on World Mission respectfully requests for the 2016-2018 triennium the same amount requested in 2012: \$95,000.

# TASK FORCE ON THE STUDY OF MARRIAGE

## Membership

The Rev. Brian C. Taylor, *Chair*  
Ms. Joan Geiszler-Ludlum, *Vice Chair*  
The Rev. Tobias S. Haller, BSG, *Secretary*  
Ms. Carolyn Chilton  
The Rt. Rev. Thomas Clark Ely  
The Very Rev. Gail Greenwell  
The Rev. J. David Knight  
The Very Rev. Will H. Mebane, Jr.  
The Rev. Dr. Cameron Partridge  
The Rev. Canon Susan Russell  
The Very Rev. Dr. Sylvia Sweeney  
The Rt. Rev. W. Andrew Waldo

### *Representation at General Convention*

Bishop Tom Ely and Joan Geiszler-Ludlum are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** To identify and explore biblical, theological, historical, liturgical, and canonical dimensions of marriage.

In 2012, the 77th General Convention set forth the work of the Task Force on the Study of Marriage in the following resolution (A050):

*Resolved*, the House of Deputies concurring, That the 77th General Convention direct the Presiding Bishop and President of the House of Deputies to appoint a task force of not more than twelve people, consisting of theologians, liturgists, pastors, and educators, to identify and explore biblical, theological, historical, liturgical, and canonical dimensions of marriage; and be it further

*Resolved*, That the Task Force consult with the Standing Commission on Constitution and Canons and the Standing Commission on Liturgy and Music to address the pastoral need for priests to officiate at a civil marriage of a same- sex couple in states that authorize such; and be it further

*Resolved*, That the Task Force consult with couples living in marriage and in other lifelong committed relationships and with single adults, and be it further

*Resolved*, That the Task Force consult with other churches in the Anglican Communion and with our ecumenical partners; and be it further

*Resolved*, That the Task Force consider issues raised by changing societal and cultural norms and legal structures, including legislation authorizing or forbidding marriage, civil unions, or domestic



partnerships between two people of the same sex, in the U.S. and other countries where The Episcopal Church is located; and be it further

*Resolved*, That the Task Force develop tools for theological reflection and norms for theological discussion at a local level; and be it further

*Resolved*, That the Task Force report its progress to the 78th General Convention; and be it further

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

#### EXPLANATION

As the Standing Commission on Liturgy and Music developed liturgical resources for blessing same-gender relationships, it faced repeated questions about marriage. What makes a marriage Christian? What is the relationship between the Church’s blessing of a relationship, whether different-gender or same-gender, and a union, “marriage” or otherwise, created by civil law? Is the blessing of a same-gender relationship equivalent to the marriage of a different-gender couple, and if so, should this liturgy be called “marriage”?

Because the Church’s understanding of marriage affects so many of its members, the Commission believes it is important to engage in a church-wide conversation about our theology of marriage. The Dioceses of El Camino Real and North Carolina have both recently undertaken studies of marriage, with reports available from the Digital Archives.

In addition to this enabling resolution, the 77th General Convention also referred to the Task Force the following Resolution 2012-D091: Amend Canon I.18.2(b) and Canon I.18.3(e-f) (Marriage):

*Resolved*, That Canon I.18.2(b) be amended to read as follows: Sec. 2(b) That both parties understand that Holy Matrimony is a physical and spiritual union of ~~a man and a woman~~ *two people*, entered into within the community of faith, by mutual consent of heart, mind, and will, and with intent that it be lifelong; and be it further

*Resolved*, That Canon I.18.3(e-f) be amended to read as follows: Sec. 3(e) “We, A. B. and C. D., desiring to receive the blessing of Holy Matrimony in the Church, do solemnly declare that we hold marriage to be a lifelong union of ~~husband and wife~~ *two persons as it is set forth in the Book of Common Prayer*. Sec. 3(f) “We believe that the union of ~~husband and wife~~ *two persons*, in heart, body, and mind, is intended by God for their mutual joy; for the help and comfort given one another in prosperity and adversity; and, when it is God’s will, for the procreation of children and their nurture in the knowledge and love of the Lord.

In order to carry out the wide-ranging nature of the assigned work, the Task Force divided various tasks into three general categories, each undertaken by a small working group:

- Marriage: Biblical and Theological Dimensions
- Marriage: Historical, Liturgical, and Canonical Roots

- Marriage: Conversations and Consultations; Changing Norms

Through these working groups, the Task Force then set out to respond to the following overall question, in light of the charge given it by the 77th General Convention: “What might The Episcopal Church have to say to today's world as to what makes a marriage Christian and holy?” **The results of their research and reflection are provided in the form of seven essays, found in the Appendices of this report:**

- A Biblical and Theological Framework for Thinking about Marriage
- Christian Marriage as Vocation
- A History of Christian Marriage
- Marriage as a Rite of Passage
- The Marriage Canon: History and Critique
- Agents of the State: A Question for Discernment
- Changing Trends and Norms in Marriages

### Meetings

The limited budget that was provided enabled the Task Force to meet face-to-face as a whole just twice, at the Maritime Institute of Technology, Baltimore, MD: July 29-August 1 2013 and March 31-April 3 2014. Further work was carried out through email, telephone, a dedicated General Convention Office Extranet site, and nine web conferences online: 6/30/13, 10/3/13, 10/28/13, 1/29/14, 06/02/14, 07/10/14, 09/03/14, 10/08/14, and 11/06/14.

The Task Force consulted broadly, as requested by its enabling resolution. These consultations consisted of:

- Conversations with bishops of the Convocation of Episcopal Churches in Europe, Province IX, Taiwan, and Haiti;
- Member participation in The Anglican Colloquium of the North American Academy of Liturgy, January 2014;
- A video presentation to all members of the House of Deputies, and an in-person presentation to the House of Bishops; input was invited and received from both groups, March 2014;
- Member participation in the Consultation on Same-Sex Marriage convened by the Standing Commission on Liturgy and Music, June 2014;
- Ongoing close communication with the Standing Commission on Constitution and Canons and with the Standing Commission on Liturgy and Music;
- A report and facilitated conversation with the House of Bishops at their gathering in Taiwan, September 2014;
- Review of resources on marriage from the Evangelical Lutheran Church in America (ELCA), The Presbyterian Church USA, The Unitarian Universalist Association, The United Church of Christ, the Church in America, and the U.S. Conference of Catholic Bishops (USCCB); and
- Review of data from the Pew Research Center.

In addition, the Task Force was in conversation with a broad range of Episcopalians through social media, generating four press releases updating the Church on the progress of our work; a Facebook page that received 21,651 hits, including views of articles posted by the Task Force; and 1,096 “likes.” A YouTube channel was created, inviting submissions of one-minute videos that described a relationship in which one “could see the face of God,” and four people submitted these videos.

In fulfillment of Resolution 2012-A050’s charge to “develop tools for theological reflection and norms for theological discussion at a local level,” the Task Force created and released in June 2014 a resource in both English and Spanish entitled, “**Dearly Beloved: A Toolkit for the Study of Marriage**” (found in the Appendices of this report). This consisted of three options for local conversation: a 90-minute event structured around a slide show presentation and one-page summaries of work done on the history, scripture/theology, and changing norms of marriage; a series of 45-minute forums on various topics related

to marriage; and a draft essay on the history of marriage, together with discussion questions. The latter resource has now been incorporated into the current version of “Dearly Beloved” found in the Appendices of this report, suggesting a study and discussion of any or all of the provided essays, which are also in the Appendices. Data on how widely this resource was used is not available, but the Task Force is aware that a number of congregations and dioceses have utilized various portions of it.

### PROPOSED RESOLUTIONS

The Task Force developed two resolutions for consideration by the 78th General Convention (see below, in order of priority). **The Task Force’s first proposed resolution consists of a rewrite of the marriage canon.** This rewrite would make the canon:

- Ordered more practically in terms of pastoral practice;
- Focused on the actual vows made in The Book of Common Prayer marriage rite, rather than on the purposes of marriage in general;
- Reflective of the theological views expressed in the Task Force’s study and essays; and
- By using gender-neutral language, responsive to both Resolution 2012-A050’s charge that the Task Force “address the pastoral need for priests to officiate at a civil marriage of a same-sex couple in states that authorize such,” and to Resolution 2012-D091, referred to the Task Force (see above).

**The second proposed resolution to “Continue the Work of the Task Force on the Study of Marriage”** provides an opportunity for the Church to study and possibly respond to the changing realities in society and in our congregations that challenge marriage as the norm for adult relationships and what it means to be a “household” or even a “family.” This topic loomed large on the periphery of the current study on marriage, but due to the constraints of time and money, and due to the specificity of the original charge in Resolution 2012-A050, the Task Force was only able to study and report on it briefly in the essay entitled, “Changing Trends and Norms in Marriage” (see Appendix).

#### A036: AMEND CANON I.18 MARRIAGE

Resolved, the House of \_\_\_\_\_ concurring, That Canon I.18 is hereby amended to read as follows:

~~CANON 18: Of the Solemnization of Holy Matrimony~~

~~Canon 18: Of the Celebration and Blessing of Marriage~~

Sec. 1. Every Member of the Clergy of this Church shall conform to the laws of the State governing the creation of the civil status of marriage, and also to the laws of this Church governing these canons concerning the solemnization of marriage ~~Holy Matrimony~~. Members of the Clergy may solemnize a marriage using any of the liturgical forms authorized by this Church.

~~Sec. 2. Before solemnizing a marriage the Member of the Clergy shall have ascertained:~~

- ~~(a) That both parties have the right to contract a marriage according to the laws of the State.~~
- ~~(b) That both parties understand that Holy Matrimony is a physical and spiritual union of a man and a woman, entered into within the community of faith, by mutual consent of heart, mind, and will, and with intent that it be lifelong.~~
- ~~(c) That both parties freely and knowingly consent to such marriage, without fraud, coercion, mistake as to identity of a partner, or mental reservation.~~
- ~~(d) That at least one of the parties has received Holy Baptism.~~
- ~~(e) That both parties have been instructed as to the nature, meaning, and purpose of Holy Matrimony by the Member of the Clergy, or that they have both received such instruction from persons known by the Member of the Clergy to be competent and responsible.~~

~~Sec. 2. The couple shall notify the Member of the Clergy of their intent to marry no less than thirty days prior to the solemnization; Provided, that if one of the parties is a member of the Congregation of the Member of the~~

*Clergy, or both parties can furnish satisfactory evidence of the need for shortening the time, this requirement can be waived for weighty cause; in which case the Member of the Clergy shall immediately report this action in writing to the Bishop.*

*Sec. 3. No Member of the Clergy of this Church shall solemnize any marriage unless the following procedures are complied with:*

*(a) The intention of the parties to contract marriage shall have been signified to the Member of the Clergy at least thirty days before the service of solemnization; Provided, that for weighty cause, this requirement may be dispensed with if one of the parties is a member of the Congregation of the Member of the Clergy, or can furnish satisfactory evidence of responsibility. In case the thirty days' notice is waived, the Member of the Clergy shall report such action in writing to the Bishop immediately.*

*(b) There shall be present at least two witnesses to the solemnization of marriage.*

*(c) The Member of the Clergy shall record in the proper register the date and place of the marriage, the names of the parties and their parents, the age of the parties, their residences, and their Church status; the witnesses and the Member of the Clergy shall sign the record.*

*(d) The Member of the Clergy shall have required that the parties sign the following declaration:*

*(e) "We, A.B. and C.D., desiring to receive the blessing of Holy Matrimony in the Church, do solemnly declare that we hold marriage to be a lifelong union of husband and wife as it is set forth in the Book of Common Prayer.*

*(f) "We believe that the union of husband and wife, in heart, body, and mind, is intended by God for their mutual joy; for the help and comfort given one another in prosperity and adversity; and, when it is God's will, for the procreation of children and their nurture in the knowledge and love of the Lord.*

*(g) "And we do engage ourselves, so far as in us lies, to make our utmost effort to establish this relationship and to seek God's help thereto."*

*Sec. 3. Prior to the solemnization, the Member of the Clergy shall determine, and shall require the couple to sign a declaration attesting*

*(a) that both parties have the right to marry according to the laws of the State and consent to do so freely, without fraud, coercion, mistake as to the identity of either, or mental reservation; and*

*(b) that at least one of the parties is baptized; and*

*(c) that both parties have been instructed by the Member of the Clergy, or a person known by the Member of the Clergy to be competent and responsible, in the rights, duties, and responsibilities of marriage as embodied in the marriage vows: that the covenant of marriage is unconditional, mutual, exclusive, faithful, and lifelong; and*

*(d) that both parties understand these duties and responsibilities, and engage to make the utmost effort, with the help of God and the support of the community, to accept and perform them.*

*Sec. 4. It shall be within the discretion of any Member of the Clergy of this Church to decline to solemnize any marriage.*

*Sec. 4. At least two witnesses shall be present at the solemnization, and together with the Member of the Clergy and the parties, sign the record of the solemnization in the proper register; which record shall include the date and place of the solemnization, the names of the witnesses, the parties and their parents, the age of the parties, Church status, and residence(s).*

*Sec. 5. A Member of the Clergy may pronounce a blessing upon a civil marriage using the liturgical forms authorized by this Church.*

~~Sec. 4~~Sec. 6. It shall be within the discretion of any Member of the Clergy of this Church to decline to solemnize or *bless* any marriage.

EXPLANATION

This proposed rewriting of Canon I.18 is intended to reflect the theological and practical view expressed in the Report of the Task Force on the Study of Marriage to the 78th General Convention. In addition to streamlining and reordering (while preserving) the basic canonical requirements, it focuses on the commitments actually made by the particular couple who come to be married, rather than on the causes or purposes of marriage in general. The present canon casts these causes in literally creedal form, as it requires the couple to declare that they “believe” a set of statements about marriage. This is to some extent problematical when one member of the couple may not be a “believer” at all or may come from a tradition with a different theology of marriage. It should be sufficient that the couple be instructed in, and understand the rights, duties, and responsibilities of, marriage as expressed in the marriage vows; and attest to that understanding as well as to their legal competence to marry.

This revision also recognizes that there are some jurisdictions (for example, parts of Europe) where clergy do not solemnize marriage; it also makes explicit provision for the blessing of civil marriage, which appears in the Book of Common Prayer but has no canonical reference at present. Section 1 also covers jurisdictions where a deacon may have the legal faculty to solemnize.

This revision recognizes that, in addition to the three rites in the Book of Common Prayer, there are (or may be) other marriage rites authorized by this Church, either for trial use throughout the Church or for provisional use under the direction of the local ecclesiastical authority.

Finally, the discretion of clergy to decline to solemnize any given marriage is preserved and extended to include the choice to decline offering a blessing on a marriage.

A037: CONTINUE WORK OF THE TASK FORCE ON THE STUDY OF MARRIAGE

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention commends diocesan and parish use of the study materials on marriage provided in the last triennium by the Task Force on the Study of Marriage, namely the “Dearly Beloved” toolkit and the appended essays in their Blue Book report to this Convention; and be it further

*Resolved*, That this Convention direct the Presiding Bishop and President of the House of Deputies to appoint an expanded Task Force on the Study of Marriage to continue this work, consisting of not more than 15 people, including theologians, ethicists, pastors, liturgists, and educators; membership should include some of the Task Force on the Study of Marriage appointed in 2012, some from dioceses outside the United States, and young adults; and be it further

*Resolved*, That the Task Force explore further those contemporary trends and norms identified by the Task Force on the Study of Marriage in the previous triennium, specifically regarding those who choose to remain single; unmarried persons in intimate relationships; couples who cohabitate either in preparation for, or as an alternative to, marriage; couples who desire a blessing from the Church but not marriage; parenting by single or and/or unmarried persons; differing forms of family and household such as those including same-sex parenting, adoption, and racial diversity; and differences in marriage patterns between ethnic and racial groups, and between provinces inside and outside the United States; and be it further

*Resolved*, That the Task Force consult with individuals and couples within these groups about their experience of faith and church life; and be it further

*Resolved*, That the Task Force explore biblical, theological, moral, liturgical, and pastoral perspectives on these matters, and develop written materials about them; and be it further

*Resolved*, That the Task Force study and monitor, in coordination with the Standing Commission on Liturgy and Music, the impact of same-sex marriage and rites of blessing on our Church; the continuing debate about clergy acting as agents of the state in officiating at marriages; and any other matters related to marriage by action of or referral by this Convention; and be it further

*Resolved*, That the Task Force report and make recommendations to the 79th General Convention; and be it further

*Resolved*, That the Task Force provide an educational and pastoral resource for congregational use on these matters; and be it further

*Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$45,000 for the implementation of this resolution.

EXPLANATION

The 77th General Convention directed its presiding officers to appoint a Task Force on the Study of Marriage, consisting of 12 people to consult, study, and provide educational resources on the subject of marriage.

In the course of completing these tasks, the Task Force became highly aware of a growing contemporary reality in society and the Church that is redefining what many mean by “family” or “household.” This changing reality is felt in our congregations, where there are an increasing number of those who fit the various categories detailed in the third *Resolve* of this resolution.

Contemporary data shows that these trends are increasing rapidly, challenging marriage as a normative way of life. And yet the Task Force did not have the time or resources to fully address this reality. More broadly, our Church has done very little to respond to it.

In addition, the landscape of marriage worldwide is changing month by month, with an increasing number of states and countries that recognize same-sex marriage. Practices of same-sex blessing and marriage are rapidly changing diocese-by-diocese as well, in a wide diversity of ways.

Clearly this time of flux bears continuing discernment and attention by our Church.

The current proposers also believe that any continuing work on this subject would be greatly enriched and would be made more accessible to Episcopalians outside the United States by including in its membership some from dioceses in other countries, and by providing adequate funding for their participation. And given that many of these changing trends are taking place among young adults, the proposers suggest that they, too, be included in its membership.

**Budget**

The budget requested for the Task Force by Resolution 2012-A050 was \$30,000, of which \$16,000 was granted by the Joint Standing Committee on Program, Budget and Finance. The Task Force spent a total of \$23,976.40. The overrun of \$7,976.40 was approved by the Office of General Convention, so that the Task Force might have a second face-to-face meeting at the Maritime Institute of Technology in Baltimore, MD in June of 2014. Without this meeting, the Task Force would not have been able to produce the “Dearly Beloved” resource; or to design, coordinate, and execute the seven essays found in the Appendix of this report.

As is evident in the second of the two proposed resolutions (see above), the Task Force is requesting a budget of \$45,000 for the next triennium in order to continue its work. The increased amount of this budget will fund three face-to-face meetings of a task force that we hope will include members from provinces of The Episcopal Church outside the United States.

The Task Force asks that funding for travel and translation be provided for these new members in order to enrich and make more accessible this important work to Episcopalians in those parts of our Church who are, perhaps even more than Americans, affected by current changing trends and norms and are able to offer insights from their contexts.

**Appendices**

1. Essays on Marriage
2. Dearly Beloved: A Toolkit for the Study of Marriage

## APPENDIX 1: Essays on Marriage

### Contents

#### Introduction

1. A Biblical and Theological Framework for Thinking about Marriage
2. Christian Marriage as Vocation
3. A History of Christian Marriage
4. Marriage as a Rite of Passage
5. The Marriage Canon: History and Critique
6. Agents of the State: A Question for Discernment
7. Changing Trends and Norms in Marriage

### Introduction

One of the defining characteristics of our Anglican tradition is how we approach significant matters that require faithful discernment. We rely upon three interrelated resources that provide a holistic and balanced method of consideration: Scripture, tradition, and reason.

The resolution that defined the work for the Task Force on the Study of Marriage (2012-A050) was broad, to say the least. It asked us to consider the historic, theological, biblical, canonical, legal, liturgical, and social dimensions of marriage. Our budget and our time together were, however, very limited.

Nevertheless, the advantage of having such a broad charge was to ensure that we would approach this important subject holistically, from all three of the traditionally Anglican viewpoints. In some of the seven essays that follow, one viewpoint may be more evident than another, but throughout them all, we have attempted to engage deeply with Scripture, tradition, and reason.

This introduction summarizes a few of the highlights of each essay, in order that the reader might see where we are headed. Those who take the time to read the essays themselves, however, will find a much richer and more nuanced treatment than what this introduction provides. We begin with a biblical and theological foundation in the first two essays, examine our history in the following three, and conclude with two on contemporary issues: whether clergy should act as agents of the state in performing marriages; and some data and reflections on the current state of marriage in our society and Church.

Please keep in mind that these seven essays, however holistic, are not an attempt to be comprehensive, and we do not consider them to be the final word. They are simply our present, admittedly limited contribution to a process of study and discernment that has gone on, and will continue to go on, for a long time.

It is our hope that these essays will provide something more than interesting reading for those who take the time. Given the changing norms and practices around marriage, blessing, singlehood, and other forms of what people consider to be “family,” the subject bears close and faithful consideration by our Church on a broad basis.

Therefore, we encourage the use of the essays, alongside our “Dearly Beloved” toolkit, as study materials in diocesan, congregational, and other settings. After assigning them as reading, facilitators might use the discussion and reflection questions that are provided in some of the essays or come up with other questions of their own.



As we begin our first essay, “**A Biblical and Theological Framework for Thinking about Marriage,**” we make it clear that we approach the subject of marriage — as has the Church for centuries — not as a matter of dogma or core doctrine, but as a concern of pastoral or moral theology. While the former is considered to be unchanging, the latter can, and does, evolve considerably over time.

Our lead-up to the subject also includes an overview of the wide range of values and regulations for marital relations that are found in biblical texts. This overview shows just how complex, evolving, and contradictory our Scriptures are on the subject, and therefore how tricky it is to speak of “the biblical view of marriage.” We demonstrate how different biblical views and practices of marriage have variously formed and influenced different parts of the faith community through history, even into our own day.

The paper then moves to the heart of the matter: a theological framework that we offer for thinking about marriage. This framework includes several powerful biblical models that serve as analogies for the relationship of marriage: God’s unconditional faithfulness and forgiveness; the paradox of union and difference in Christ; and Christ’s self-offering in love that is at the heart of the Paschal Mystery.

Finally, the essay concludes with a discussion about the marriage of same-sex couples, making four points. The first is that when our criteria for a holy marriage are based upon the moral values of self-offering love, our conclusion is that same-sex couples are as capable of a holy marriage as are different-sex couples.

Second, the essential quality of marital unity *in difference* outlined previously can be present for same-sex couples in ways other than the often-cited “complementarity” of different-sex couples.

Third, “it is not in the sex difference, or in sex itself (whether understood as the sex of the bodies involved or the sexual act) that moral value lies,” since moral value is determined by “the context and relationship of the actors,” rather than by actions alone.

And last, the clear expectations that General Convention resolution 2000-D039 set forth for any committed lifelong relationship, including same-sex couples, are seen as central to our understanding of the very nature of marriage and its vows.

In our second essay, “**Christian Marriage as Vocation,**” we consider marriage itself as “a calling, a spiritual practice, a particular, vowed manner of life ... , a way of being in and engaging the world, of ordering our life in ways that facilitate our participation in the wider purposes for which God created us, redeemed us, and brings us into newness of life.” This vocation is not for everyone, for Scripture itself reminds us that not all are called to marriage. However, it is set within, and as a part of, the more fundamental, universal vocation of love.

A section follows that more fully examines the notion of union-in-difference and “complementarity” that the previous essay introduced. Relying upon Paul’s understanding of the “new creation” that is made in Christ, where traditional binary distinctions of male/female, slave/free, Jew/Gentile are broken down, we can then see the gift of marital difference in terms much broader and more complex than those of sex. It is the mystery of union and difference that matters in marriage, rather than the sex of the partners.

Gospel and Pauline themes provide depth to our understanding of the vocation of marriage, as they show how “particular graces or charisms gifted to each of us from God can come to their fullest fruition through the relationships and commitments we form,” including marriage. The theme of “abiding” in John 15 helps us see marriage as a form of avowed stability, a vessel that God uses to help us to bear the fruit of love. Paul emphasizes the transformational quality of life in Christ in which we are made anew, and in marriage we can see the possibility of gradual, lifelong metamorphosis. As such, the vocation of marriage can be “a way of participating in the ongoing renewal of creation.”

The following three essays are historical. The first of these, “**A History of Christian Marriage,**” demonstrates, as do our sections on Scripture, just how complex and diverse the beliefs and practices about marriage have been within the faith community.

The various practices of early Jewish and Roman Hellenistic marriage are discussed, with themes that range from marriage as a partnership within a social context, procreation, belovedness, divorce, polygamy, patriarchy, and power.

In the early Church, we see a countercultural shift that “invites Christians to imagine a different kind of family from the paternalistic families of either Judaism or Rome,” as family was now found through spiritual identification rather than through blood lines and social status. In the late New Testament era and beyond, the Church began, on the one hand, to commend abstinence and singleness over marriage, and on the other, to align more closely with the values of the empire.

In medieval times, familial and tribal partnerships are paramount; and in the High Middle Ages, an emphasis on chivalric romance — along with its objectification of women as noble, chaste, and pure beings — becomes a part of the backdrop for marriage. The Reformation rejected the primacy of the celibate life and emphasized companionship and the family as the central building blocks of the Christian life. In the New World, there were “numerous ways in which marriage law was used to oppress, and ... numerous ways in which subjugated people continued to find means to establish intimate bonds of familial relationship despite the impediments to volitional marriage.”

The modern age brought a new call for rights and freedoms for women, and this, in turn, led to dramatic changes in the nature of marriage and family life, including a more peer-based relational model. At the same time, “the imperative to develop a theologically sound and culturally sensitive response to the question of the sanctity of a same-sex marriage has heightened.”

A part of this complex history of marriage is the closer focus of “**Marriage as a Rite of Passage,**” our next essay. Beginning with a model introduced by 20th-century anthropological studies, we see how marriage, like other rites of passage, consists of a formal ritual action designed “to help individuals or communities transition from one life state to a new one.”

This time of transition serves as a “liminal state,” wherein the participants are separated from their old way of life and yet are not fully incorporated into their new one. This liminal space can provide an experiential context, allowing for greater freedom, intimacy, and reinvention.

In the past, this liminal space between singleness and marriage was marked by rites of betrothal. As these practices have gone out of use, new ones have somewhat replaced them: the publishing of banns, premarital counseling, and, increasingly in our day, cohabitation as a stepping-stone to marriage. From an anthropological point of view, one could see this latter development as “a potential correction” to the loss of liminal space prior to marriage, recapturing something of the sense that marriage is something “that can and should be eased into rather than jumped into.”

The essay concludes with the assertion that marriage can, at times, be a rite that subverts the status quo, a prophetic act. Examples given are interfaith and interracial marriages and new familial bonds that are created across class lines, political affiliations, and ethnicities. As younger generations cross these boundaries more easily than those before them, we now have greater potential to incarnate a Gospel vision of the world as it can be — a world marked by more equality, richness, and diversity.

The third in our series of historical essays is “**The Marriage Canon: History and Critique,**” which shows that discussions in The Episcopal Church about marriage have largely been about remarriage after divorce. As is

often the case, changes in canon law have followed changes in practice. And so the essay traces some of these changes in society that forced issues resulting in canonical responses.

At first, remarriage after divorce was prohibited entirely, then only in the case of adultery, and then finally in other cases, but by petition to the bishop. In addition, other regulations were introduced after society experienced a significant rise in the divorce rate: requirements for pastoral preparation and instruction, verification that the couple had a legal right to be married, the presence of witnesses, the entry of information into the parish register, and so on.

The essay concludes with a series of questions that offer a critique of the current marriage canon. Included in this critique are explanations for each of the changes to the marriage canon that this Task Force proposes in resolution form.

Our essays now shift to two contemporary subjects. The first of these is discussed in “**Agents of the State: A Question for Discernment**,” which directly addresses the question that many today are asking: “Should the Church be in the marriage business at all?” — that is, as agents of the state. Without drawing a firm conclusion, we note that whatever the Church may decide on this matter, our discernment must include practical and ethical considerations about whether our participation in civil marriage enables us to be better agents of social transformation, makes us complicit in furthering injustice, or potentially does both.

Our final essay is “**Changing Trends and Norms in Marriages**.” As required by our enabling resolution 2012-A050, we consulted broadly with individuals, couples, scholars, and ecclesial partners; and we considered current social research and data on marriage. These consultations and the information we uncovered were extremely helpful in gaining a clearer picture of the state of marriage today.

The main issue that we identified for our reflection as a church has to do with the current drop in marriage rates, and for those who do marry, a delay until a later age than ever before. Cohabitation, as a temporary option or alternative to marriage, is significantly on the rise. Possible historical causes, as well as costs and benefits of these trends, are outlined, including possible impacts that the Church may consider in its mission and pastoral ministry.

The essay concludes with a section on differences in marriage trends among groups identified by race and ethnicity: African Americans, Hispanics and Latinos, Native Americans, and Asian Americans. Finally, we included some statistics regarding same-sex marriage that were current as of the time that this document was submitted.

*Note: the Task Force on the Study of Marriage wishes to thank Peggy Van Antwerp Hill, who expertly and promptly edited the essays that follow.*

## ESSAY 1: A Biblical and Theological Framework for Thinking about Marriage

### 1. Introduction

One of the charges of the A050 Task Force on the Study of Marriage was to assist the Church and its members in engaging with the complexity of marriage. As Resolution A050 puts it, the Task Force was asked to “develop tools for theological reflection and norms for theological discussion at a local level.”

In this first part of our report, the Task Force offers some starting points for reflection on the theological aspects of marriage. As heirs to the Anglican tradition of rooting theology in the Scripture and in the liturgies of the Church (themselves informed and formed by that Scripture) we begin with a look to how marriage is seen in the light of those rich resources.

#### A first word on “marriage”

One question that ought to be addressed at the outset, but which may at first appear trivial, is, “What constitutes marriage?” The traditional answer — “Marriage is the lifelong union of one man and one woman” — is, like many simple answers to complex questions, only partially true. As the historical essay that forms a part of this report shows, there has been a great deal of variation as to what constitutes “marriage” throughout the world, and even within the traditions of Christianity and Judaism, there are variations and discontinuities as to what makes a marriage.

One of the issues facing the Church of the seventh through the twelfth centuries was the difference of opinion on what constituted a marriage. Some theologians, influenced by Germanic traditions as well as by an understanding expressed in the Jewish law that when a man “takes” a woman she becomes his wife, held that it was coitus that constituted the marriage and made it indissoluble. Other theologians, particularly in Italy, rested on a more contractual notion (related to, but differing from, Roman civil law in some details) that it was the consent of the couple that constituted the marriage. The eventual papal ruling settled the debate (for Roman Catholics) by taking a middle ground: consent *makes* the marriage, but consummation *seals* it (Brundage, 331).

As noted, the concept of consent was not particularly *biblical*. Given the power dynamics that favored men over women under Jewish law, women had little control over their marital destiny. Perhaps the most extreme example of this is the biblical law that allows for marriage by rape and purchase (Deuteronomy 22:28-29); but even in demonstrably loving and caring settings, the wife had little control over her husband’s right to a second wife (1 Samuel 1:2). The asymmetry of the boundaries in marriage is perhaps best revealed in the unequal understanding of adultery: a man could commit adultery only by violating another man’s marriage; a woman, only by violating her own (Leviticus 20:10).

A discontinuity settled early in the life of the Church concerned the number of wives a man might have, although the trend toward monogamy had as much to do with ascetical thinking in Greco-Roman and sectarian Jewish circles as with early Christian thought. Monogamy quickly moved from a moral ideal (and under Roman law, a legal limitation) to a practical restriction. (As we will see below, some ascetical moralists in both Jewish and Christian settings felt that monogamy was absolute; even for a widow or widower to remarry was an indication of moral frailty. This thinking may underlie the limitations in the pastoral Epistles concerning marriages of clergy and enrolled widows; 1 Timothy 3:2, 12; 5:9; Titus 1:6.)

An issue that remained far less settled concerned the degree of consanguinity or affinity permitted between the parties to be married. Even within the Torah (and the Rabbinic law that supplements it) there is some inconsistency concerning degrees of relationship within which marriage is prohibited. For example, Leviticus

18:12-14 forbids a man marrying his aunt, but as the law is silent on the subject, an uncle may marry his niece. (This provision is recognized in some civil jurisdictions to this day, as in Rhode Island, which permits marriages allowed under Jewish law; see Code 15.1.1 *et seq.*)

Although the biblical law permits marriage of first cousins (see, for example, Numbers 36:8-13), the medieval Church extended the restrictions and prohibited marriage between parties as distant as the sixth or seventh degree of kinship. Considerable inconsistencies in definitions of what constitutes incest remain between some civil jurisdictions: many U.S. states prohibit first-cousin marriage, although in some states (Arizona, Indiana, Illinois, Utah, Wisconsin), exceptions are granted in cases of infertility or advanced age; in other states, first cousins may marry without hindrance.

Perhaps the most striking change involved the Church's prohibition of a biblical mandate: the Levirate law outlined in Deuteronomy 25:5-10, by which a man was to marry his brother's childless widow. The Church reckoned that this was incest, privileging the prohibition in Leviticus 18:16, even though the regulation in Deuteronomy is laid out as an exceptional circumstance. (This legal tangle strikes close to home for Anglicans, since this formed part of the basis for Henry VIII's marriage, and its later annulment, to Catherine of Aragon.)

Finally, whether marriage is by nature lifelong or capable of dissolution receives a mixed witness in Scripture. The Torah provides for divorce for any cause (Deuteronomy 24:1), while Jesus limits the cause to adultery (Matthew 5:31-32, 19:3-10); Paul further complicates the matter by introducing the idea that when one of a married non-Christian couple is baptized, the other has the right to divorce (1 Corinthians 7:12-13). This teaching stands in tension with Jesus' teaching that the bond of marriage is ordered in creation, rather than in Christendom. Down through the Christian centuries, the grounds for divorce expanded and contracted in both civil and canon law, to the point at which the "lifelong" character of marriage is so by "intent."

So it is that a part of the reflection with which the Church is called to engage concerns the range of possible relationships that constitute *marriage*. As the preceding paragraphs have indicated, many aspects of the nature of marriage have changed considerably, even within the Christian tradition. The one element that has remained stable is the relative gender of the spouses. This is a question that faces the Church in our own time, and one which has to a great extent brought us to this closer examination of what is meant by *marriage*.

The Church and the wider society are facing the question: Is the "male and female" of marriage an essential or yet another variable element in marriage? Is it a permitted variable in a civil context but not a religious one? So much has changed or varied in what constitutes marriage. Is the gender difference the sole unchangeable characteristic that makes a marriage a marriage, regardless of any and all other variations? This paper will seek to provide a framework for thinking about this question, to see if there is a theological rationale for maintaining this element as essential to marriage, or to see it as a characteristic in which grounds for variation can be not only explored, but formalized as well.

### **A second word on "theology"**

However, before going further, it is also important at the outset to be clear about what is meant by "theology" — and what sort of theology we are addressing. Marriage is not a subject of dogmatic theology, but of moral or pastoral theology. This means that there is no core dogmatic doctrine concerning marriage, although there is a long history of regulation concerning who may (or can) marry whom, when and where, and under what circumstances; and considerable reflection on the morals and goods of marriage. There is also a rich banquet of biblical and traditional symbolism surrounding marriage — as there is surrounding banquets themselves — a fact which serves to demonstrate how human activities, particularly activities that foster community, illuminate and are illuminated by theological reflection.

Apart from these symbolic applications — some of them embodied in the liturgies of marriage — the Church did not engage in much strictly doctrinal thinking on the topic for centuries, until the later debates concerning the nature and number of the sacraments. Prior to the time of those debates, the Church engaged (as noted above) in considerable discussion about legal and moral issues, such as the marriage of a Christian with a nonbeliever, and remarriage after divorce or in widowhood, but there was no dogmatic reflection on marriage itself; it was marriage *discipline* that occupied the attention of the Church.

The scope of doctrinal or dogmatic theology, particularly as formed in the Anglican tradition, is limited. Doctrine (“believed as an article of the Faith”) is constrained by that which can be proved by Scripture (Article VI of the Articles of Religion, BCP, 868). This way of looking at doctrine affirms *sufficiency* rather than *detailed elaboration* and is focused on, but not confined by, the Creeds (in particular the Nicene Creed, which is described as a “*sufficient* statement of the Christian Faith” in the Lambeth Quadrilateral).

As with the understanding of “the sufficiency of the Holy Scriptures for salvation” (Article VI), the concept is that not every theological issue need be addressed in detail, and that a set of basic guiding principles can set the ground rules within which the Church has authority to act. The Creeds, of course, say nothing of matrimony; moreover, the classical Anglican catechisms are also silent on it, while the 1979 BCP catechism gives only a brief description of it on page 861.

The Articles of Religion decline to name matrimony a sacrament (as it “lacks any visible sign or ceremony ordained of God”), and classify it as an estate allowed (Article XXV), while holding it to be available to clergy (as to all Christians) as they judge it to be conducive to a moral life (Article XXXII). Given the relatively sparse attention given to marriage, the principal doctrinal formularies of the early Church and later Anglicanism, we are left with what the Scripture and the liturgies of the Church tell us about it.

When we look to those sources, what we find, in addition to the occasional symbolic application of marriage, is a narrative encompassing several different forms of marriage, along with a record of changing rules and laws, rites, and ceremonies — all of which, as the Articles of Religion (XX, XXXIV) also remind us, are subject to amendment by the Church, as questions of discipline rather than of doctrine. It is not so much a matter of the Christian faith as it is of living a *Christian life*.

As noted above, and as reference to the historical paper that forms a part of this report demonstrates, the discipline of marriage has changed considerably through the centuries both in biblical times and after the biblical canon closed. Examples of amendment already cited include Jesus’ own teaching on the indissolubility of marriage, setting aside a permissive statute in the Law of Moses (Matthew 5 and 19), and the Church’s later prohibition of a biblical mandate (the Levirate Law expounded in Deuteronomy 25:5-10, but recorded as being in force as early as Genesis 38:8 as well as being foundational in Jesus’ family tree in the story of Ruth).

In keeping with all of the foregoing, the theological approach taken here is not dogmatic but pastoral, and it will focus on the moral issues raised by marriage. It will serve to provide a basis for consideration by the Church the primary question that has shaped our work as a task force: “What might our Church want to say to the world today about what it is that makes a marriage holy and particularly Christian?”

## **2. A Theological Arc**

### **The question raised by marriage**

Any discussion of Christian marriage is helpfully guided by asking the question, “What makes a marriage Christian?” What is it about this nearly universal human phenomenon, which exists in many forms and in many cultures and contexts, to which the Church feels confident in pointing as a sign of God’s action in the world?

Up until relatively recently in church history, the answer to the question of “What makes a marriage Christian?” was relatively simple. In the apostolic period, attested by Paul in 1 Corinthians 7 (the longest and most detailed reflection on marriage in Scripture), marriage was a social institution regarded with toleration rather than encouragement, and for which no liturgical ceremony was prescribed. A marriage was considered Christian if it took place between two baptized persons. A pagan couple, one of whom became baptized, was allowed to end the marriage if the pagan member did not wish to remain (vv. 12-15).

One who was already baptized was not to marry a nonbeliever; Paul alludes to this discipline in verse 39, and it became a matter of church law fairly quickly, and remained so for centuries with varying degrees of enforcement or toleration, from excommunication or capital punishment in the early fourth century (Watkins, 495-96), to dispensation under current Roman Catholic regulations (see the current Code of Canon Law at 1086.2).

The understanding became (and remains) that the bond and covenant of marriage is enacted by the couple themselves, and the function of the Church is to solemnize the event with a degree of formality, with the three aspects of *testimony*, *blessing*, and *recording*. The Church took on the civil responsibilities (and is still permitted so to do in many places, though not all) of ensuring that the marriage is attested by witnesses and recorded, and added its own function of imparting a blessing.

Since the ministers of the rite are the couple themselves, the tradition in place since the apostolic era required that they both be baptized. This requirement came to be seen as less than absolute, and dispensations became available in the Roman Catholic tradition as early as 1669 (Watkins, 575).

In 1946 The Episcopal Church went a step further, when the canons were amended to permit marriage when one of the parties was not baptized. There was strong objection to the introduction of this change, given the intensity of early and historic church opposition to such marriages. It brought into question the meaning of another part of the marriage canon that described marriage as being “entered into within the community of faith.”

As many, if not most, marriages are not necessarily parish functions but involve the friends and family of the couple — many of whom may also not necessarily be baptized — this clause appears to be aspirational rather than absolute (see White and Dykman, 414). In short, the old, easy definition of what made a marriage Christian came to be no longer applicable in all cases.

### **An icon for the Church or of the Church**

The traditional answer to the question of *holiness* in marriage, however, lies in the prologue to the marriage rite as it has come down to us, through many modifications, simplifications, and elaborations, but which, in its present form in The Episcopal Church, states that marriage “signifies to us the mystery of the union between Christ and his Church” (BCP, 423).

This role of *signification* has been a part of Anglican marriage liturgies since 1549. It rests on a much older principle with roots in the Hebrew Scripture, which analogized the love of spouses with the love of the Lord for the Chosen People. However, it is important to note that the biblical analogy is used for faithful as well as unfaithful relationships, recognizing that marriage in itself is morally neutral and can be good or bad to the extent the spouses are faithful to each other.

For example, from the negative side, Jeremiah 3, Ezekiel 16 and 23, and Hosea 2 and 3 present us with imagery of the Lord as the loving husband of an unfaithful spouse (or spouses, as in Jeremiah and Ezekiel the Lord is married to the two sisters, Israel and Judah). Jeremiah 3:6-8 presents this image:

Have you seen what she did, that faithless one, Israel, how she went up on every high hill and under every green tree, and played the whore there?<sup>7</sup> And I thought, "After she has done all this she will return to me"; but she did not return, and her false sister Judah saw it.<sup>8</sup> She saw that for all the adulteries of that faithless one, Israel, I had sent her away with a decree of divorce; yet her false sister Judah did not fear, but she too went and played the whore.

Ezekiel 16:7-21 portrays a vivid image of a loving and indulgent husband betrayed by his unfaithful spouse. (Note the resonance between verse 9 and the imagery of Ephesians 5:25-27).

You grew up and became tall and arrived at full womanhood; your breasts were formed, and your hair had grown; yet you were naked and bare.<sup>8</sup> I passed by you again and looked on you; you were at the age for love. I spread the edge of my cloak over you, and covered your nakedness: I pledged myself to you and entered into a covenant with you, says the Lord GOD, and you became mine.<sup>9</sup> Then I bathed you with water and washed off the blood from you, and anointed you with oil ...<sup>13</sup> ... You grew exceedingly beautiful, fit to be a queen.<sup>14</sup> Your fame spread among the nations on account of your beauty, for it was perfect because of my splendor that I had bestowed on you, says the Lord GOD.<sup>15</sup> But you trusted in your beauty, and played the whore because of your fame, and lavished your whorings on any passer-by ...<sup>20</sup> You took your sons and your daughters, whom you had borne to me, and these you sacrificed to them to be devoured. As if your whorings were not enough!<sup>21</sup> You slaughtered my children and delivered them up as an offering to them.

Ezekiel 23:2-18 follows Jeremiah in portraying the Lord as the husband of two unfaithful sisters:

Mortal, there were two women, the daughters of one mother; ...<sup>4</sup> Oholah was the name of the elder and Oholibah the name of her sister. They became mine, and they bore sons and daughters. As for their names, Oholah is Samaria, and Oholibah is Jerusalem.<sup>5</sup> Oholah played the whore while she was mine; she lusted after her lovers the Assyrians ...<sup>9</sup> Therefore I delivered her into the hands of her lovers, into the hands of the Assyrians, for whom she lusted.<sup>10</sup> These uncovered her nakedness; they seized her sons and her daughters; and they killed her with the sword. Judgment was executed upon her, and she became a byword among women.<sup>11</sup> Her sister Oholibah saw this, yet she was more corrupt than she in her lusting and in her whorings, which were worse than those of her sister ...<sup>18</sup> When she carried on her whorings so openly and flaunted her nakedness, I turned in disgust from her, as I had turned from her sister.

As a final example, Hosea 2:2-19 lays out the prophetic figure of infidelity representing apostasy and idolatry, but with a hope of eventual redemption and the beginnings of a transformation of the husband from "Lord" to "spouse." This is also carried forward in Ephesians, where the husband is called to love his wife not as "Lord-over" but as "servant-of."

Plead with your mother, plead — for she is not my wife, and I am not her husband — that she put away her whoring from her face, and her adultery from between her breasts, ...<sup>15</sup> ... I will give her her vineyards, and make the Valley of Achor a door of hope. There she shall respond as in the days of her youth, as at the time when she came out of the land of Egypt.<sup>16</sup> On that day, says the LORD, you will call me, "My husband," and no longer will you call me, "My Baal."<sup>17</sup> ...<sup>19</sup> And I will take you for my wife forever; I will take you for my wife in righteousness and in justice, in steadfast love, and in mercy.

In the context of prophetic metaphor of the relation between God and the Chosen People, marriage can be portrayed as good or bad. This reflects the human reality that while marriage may be good or holy in and of itself as an institution, a particular marriage can be, and of right ought to be, a vehicle for holy living, for which the only guarantors are the couple themselves, aided by God and the community of support in which their marriage is set. Turning from the negative imagery of the prophetic writers, many Christian authors



through the years drew on the happier imagery, such as that in the Song of Songs, in an allegorical light, applied to the Church as the people of God.

However, the ultimate touchstone for Christian reflection on holy marriage is the passage from Ephesians (5:28-32) in which the author attempts to express how it is that the many become one in Christ. He draws on the tradition of the Hebrew prophets and poets and uses marriage as an analogy to this “mystery” of the Church — not, contrary to the language of the prologue to the marriage liturgy, primarily for symbolic value (“marriage tells us something about Christ and the Church”) but as a teaching example (“married couples should be one in love, just as Christ in loving the Church is one with it”). The issue is not, “if you want to know something about Christ and the Church, look to marriage,” but “if you want to know how to make your marriage holy, look to Christ.” Here is the actual text, including a portion of a verse that appears only in some manuscripts:

Husbands, love your wives, just as Christ loved the church and gave himself up for her,<sup>26</sup> in order to make her holy by cleansing her with the washing of water by the word,<sup>27</sup> so as to present the church to himself in splendor, without a spot or wrinkle or anything of the kind — yes, so that she may be holy and without blemish.<sup>28</sup> In the same way, husbands should love their wives as they do their own bodies. He who loves his wife loves himself.<sup>29</sup> For no one ever hates his own body, but he nourishes and tenderly cares for it, just as Christ does for the church,<sup>30</sup> because we are members of his body [of his flesh and of his bones].<sup>31</sup> “For this reason a man will leave his father and mother and be joined to his wife, and the two will become one flesh.”<sup>32</sup> This is a great mystery, and I am applying it to Christ and the church. (Ephesians 5:25-32, with bracketed text from the notes; also note that the Greek of the final clause is perhaps more simply stated as, “but I speak of Christ and of the church.”)

This passage and its larger context of instruction to households have become problematical in an era in which the equality of the sexes is with few exceptions either unchallenged or championed. The author writes from and to a context in which the secondary status of women was accepted as the norm. However, even within that context, the author — identified as “Paul” in keeping with the tradition, while noting the lack of consensus on the authorship of this epistle — is attempting to shift toward a more equal understanding in the relation of the sexes.

Note, for example, the paschal notion of the man giving himself for the woman (rather than the more conventional call for the woman to surrender to the man) in 5:25. This is less revolutionary than the statement in the undoubtedly Pauline 1 Corinthians 7:4, in which mutual authority is explicitly laid out, each spouse holding “authority” over the body of the other. (Perhaps Ephesians 5 reveals some authentic Pauline liberation showing through the gloss of later applications of household codes.)

Still, the language of male headship is part of the text before us, and, as unpalatable as it is for most of the present generation, it cannot be denied. What is significant is that the role of the head over the body is directed not to domination, but to care, redemption, and self-giving — a kind of kenotic lordship that agrees well with the broader understanding of Christ as head of the Church, who gave his life for it. This destabilizes the traditional notion of male superiority and female submission, much as Jesus himself, as “master,” inverted the normative role assigned to him by taking the role of a servant on the night before he suffered, and called on the disciples to engage in just this reciprocal ministry of mutual submission (John 13:13-15).

So the tradition of reading this passage as laying out marriage as an allegory or signifier for Christ and the Church is likely missing a crucial part of Paul’s intent, explored at length in this report’s essay, “Christian Marriage as Vocation.” Paul’s reflects on a far greater mystery: the mystery described earlier in the epistle, the eschatological “mystery of his will, according to his good pleasure that he set forth in Christ, as a plan for the fullness of time, to gather up all things in him, things in heaven and things on earth” (Ephesians 1:9-10).

It is in this Church (the “assembly” that by its very nature unifies the plural) that Jew and Gentile are made one out of two through the flesh and blood of Christ (Ephesians 2:13-14, 21-22). This is crucial in the sense both of *important* and *paschal* — the cross underscores the Pauline teaching that it is in, with, and through Christ, and him crucified, that God’s mystery of union is made plain. Paul places his household instructions within this larger context: husbands are to model their relationship with their spouses on the love of Christ for the Church; it is not that earthly marriages are mere symbols of the heavenly union, but that the heavenly union is the model which earthly marriages should emulate in order to be holy.

By employing this rhetoric, Paul reaches back long before the Incarnation and the Song of Songs, to the primal story of the first spouses described in Genesis 2. Just as Adam recognizes “himself” in Eve — “of his flesh and of his bones” — so too the Church shares a corporeal identity with Christ. Christ loves the church, his body — and the language of both Baptism and Eucharist (in both Word and Sacrament) is echoed in Ephesians: “Christ loved the church and gave himself up for her, in order to make her holy by cleansing her with the washing of water by the word” and Christ “nourishes and tenderly cares for” this body (5:25-26, 29).

Paul builds on his image of the Church as both Bride of Christ and Body of Christ, in his own way creating a bridge between the imagery of Genesis and Revelation. Marriage can indeed give us a glimpse of heaven, when and to the extent that it is modeled upon the heavenly archetype of Christ and his self-giving relationship with the Church, his body on earth. It is not marriage in the abstract or as an institution that “signifies” the relation between Christ and the Church, but more that a particular good marriage, when modeled on the love of Christ for the Church, incarnates the archetype on which all love is based.

So in response to the question, “What makes a marriage holy?” the answer that it “signifies ... the mystery of the union between Christ and the Church” provokes a second question: “how do we understand this significance?” or “what are the signs of this holiness, this Christian identity?” For obviously, it is not just any marriage that is holy, any more than just any marriage is Christian.

Just as there are good and bad marriages portrayed in Scripture, there is a qualitative difference between the quickly engaged and quickly ended Hollywood or Las Vegas marriage, and that of a couple who have spent a lifetime together, sharing their lives with each other and with a wider community. So what are the signs that indicate the holiness of a marriage? And in what ways do these signs proclaim that a marriage is Christian?

Returning once more to Ephesians for guidance, note the verse that comes as an introduction to the chapter addressing marriage: “Live in love, as Christ loved us and gave himself up for us, a fragrant offering and sacrifice to God.” This verse perhaps suffers from being too often heard as an offertory sentence, familiarity blunting the force of the call to paschal, loving self-offering that lies at the heart of the Christian vocation, following the kenotic path laid out by Christ himself.

It might be helpful to look at similar language from the Gospel of John, in the long reflection on the nature of the love of God and the mystery of Christ’s union in and with the Church. Jesus expounds on this at the Last Supper: “This is my commandment, that you love one another as I have loved you. No one has greater love than this, to lay down one’s life for one’s friends” (15:12-13); “I in them and you in me, that they may become perfectly one, so that the world may know that you sent me and loved them even as you loved me” (17:23).

As noted in the paper, “Christian Marriage as Vocation,” this quality of union through loving and mutual self-offering is central to the vocation of marriage, recognized as a particular call within the universal call for Christians to love one another, and in terms of Ephesians, with Christ and his gift of himself as the template or model for the self-giving of spouses in marriage. For in marriage, the spouses literally “take” each other and “give” each other, reciprocally, exclusively, unreservedly, wholly, and unconditionally: as the declaration

of consent and the vows so eloquently state: to “love ... honor ... comfort ... and keep ... forsaking all others ... to have and to hold from this day forward, for better for worse, for richer for poorer, in sickness and in health, to love and to cherish, until we are parted by death” (BCP, 424, 427).

The reciprocal nature of the vows — the commitment of each spouse to do for the other as they would be done by — reflects the Golden Rule as well as the transformative “giving” of Jesus for the Church, elaborated in Ephesians and signified in the Maundy foot washing, and most starkly in the painful glory of the cross.

As spouses love each other “as Christ did the church” they incarnate the values of “fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God” (D039-2000). As they live out this love, the wider community of the faithful, and those beyond it, will be able to see “a sign of Christ’s love to this sinful and broken world, that unity may overcome estrangement, forgiveness heal guilt, and joy conquer despair” and “that all married persons ... may find their lives strengthened and their loyalties confirmed” (BCP, 429-30).

Marriage, as an icon for and of the Church, reaffirms that we do not live for ourselves alone, or die for ourselves alone (Romans 14:7) — nor do we marry for ourselves alone, but as a sign and emulation of God’s grace and to God’s glory. The love of God for the world in the loving self-offering of Christ Jesus thus becomes a guiding and effective pattern in discerning how a marriage proclaims that it is a Christian marriage, an evangelical sign of that “wonderful and sacred mystery” that is Christ’s body, the Church.

The relationship of marriage to that larger body is emphasized in the liturgy through the requirement that marriage take place within at least a minimal assembly. As the BCP rubric notes, “marriage is a solemn and *public* covenant” and there must be “at least two witnesses” (422). Couples do not make their vows privately, but before God, friends, family, and (ideally) God’s community, the Church. The marriage is a union celebrated and blessed on behalf of the Church in the midst of this community that is, ideally, itself “one in Christ.”

As marriage is an incarnational sign of Christ’s love for the Church, so it is also an expression and sign of Christian community: our life together in and as the Body of Christ. The old patristic tag (said of the Eucharist) “become what you behold” is a powerful reminder of the way in which a marriage both draws upon the love of God and the community and fosters it. So a marriage not only is blessed by the Church, but is a source of blessing for the Church.

And this blessing does not stop at the end of the rite. The community witnesses to the couple by their presence at the marriage service and throughout their marriage journey in their support of the couple. The couple, in turn, witnesses to the community by how they live their lives together — showing Christ’s love to each other, the community, and the world. If marriage is a sacrament — and that has been a topic of considerable debate — it is certainly sacramental in this: it can both express and evoke in others the graces of loving, self-giving charity inherent in the vows.

Although marriage does not have “a like nature of Sacraments with Baptism and the Lord’s Supper” because it lacks “any visible sign or ceremony ordained of God” (BCP, 872), the real grace of marriage lies not in the wedding ceremony, but in the life of the couple: as with the baptismal life, and the life of the eucharistic community that is the Church, it is in the living of the vows, the putting into practice of the promises and commitments, that grace is revealed and shared.

### **3. The Ethics of Marriage**

As noted, the *exemplary* function of marriage — as a sign and echo of Christ’s self-giving love for the Church, conceived in Ephesians both as his body and spouse — is a particular vocation within the larger Christian

calling. As a Christian vocation, the *moral* significance of a marriage will be expressed by how the spouses treat each other, how they incarnate and live out the Rule of Married Life, the disciplines and responsibilities of that life, and its joys and rewards.

In some discussions of morality, the locus of concern can lie in the acts more than the actors. In marriage these two aspects of morality — acts and actors — merge in the spouses themselves, who become spouses through the marriage. The reality of being a spouse is not ontological, but performative and relational. So the efficacy of the *sign* will depend on the degree to which the spouses express and live out the values intended in the vows, which constitute the substance of the marital commitment.

As the essay, “Christian Marriage as Vocation” also underscores, a marriage is a way of life, a discipline, and a discipleship within the larger community of Christian disciples who make up the Church. In this sense, it is a living out of the Gospel value of love, an evangelical witness that “preaches Christ.”

To echo the language of John (1 John 4:20), those who do not love their spouse, whom they have seen, cannot claim to love God, whom they have not seen. And it is in how their love is expressed to one another that others can see the love of God. The spouse is the closest and most intimate *neighbor* for the enactment of the Golden Rule. The theological virtue of charity truly does begin at home.

In this light, it is helpful to examine the ethics of marriage through a principle elucidated by the eighteenth-century Prussian philosopher and ethicist, Immanuel Kant. He held that people should treat each other as ends in themselves rather than as means to some other end, valued in and for themselves rather than for their utility or productivity.

This relational notion is fully consonant with the Baptismal Covenant’s call to respect the dignity of every human being, and with the understanding of each human being as a living image of God. This ethical notion has particular application to marriage conceived as a mutual covenant of two persons rather than merely as a contract between two parties for the performance of services.

The reality of marriage lies in the couple themselves, and in their mutual self-giving as it reflects and embodies the love of Christ for the Church, in that each spouse lives and strives for the good of the other. This transforms and redirects the innate trend toward self-interest that lies at the core of Original Sin, toward recovery of the Original Blessing intended by God for human flourishing, as a response to the “not good” of isolation being rectified by the discovery of the “one like himself” (Tobit 8:6).

It would be helpful at this point to be reminded of three things about self-giving:

First, the gift of oneself to and for another is not to be confused with a kind of paradoxical “selflessness.” To give a self that has been reduced to a nonentity is to give nothing. Moreover, the concept of “selflessness” represents a devaluation of the “dignity of every human being” (BCP, 305). Every person is precious, and to give oneself is to offer a supremely valuable gift, only worthy to be given for the sake of another, a gift for which “the whole world” would be inadequate recompense (Matthew 16:26).

It is also a sad fact that “selflessness” has often been promoted as a particular call for women; the stereotype of the dominant husband with a “selfless” wife has even in some situations been held up as an ideal. In addition to fostering a false notion of selfhood, this represents an inversion of the imagery advanced in Ephesians 5, in which the *husband* is called to model Christ’s sacrificial self-giving for the sake of the Church.

Second, while the ultimate paradigm in Christ’s self-giving — as the highest love shown in giving up one’s life for others (John 15:13) — is both costly and painful, it is also the cause of joy. The Paschal Mystery

encompasses this marvelous interchange in which “the cross he bore” is “life and health” to humanity, “though pain and death to him” (Hymnal 1982, 483).

Third, each Christian participates in this Paschal Mystery, and further is called to take up his or her own cross to follow the Lord in this path of self-giving. It is a universal call, but it is given a particular form in marriage, in which the couple give themselves to each other, giving and receiving to and from each other in a paschal and a joyful exchange, incarnating the Original Blessing as they celebrate the costly paschal vanquishing of Sin.

This movement from sin to blessing is reflected in the wedding that provides a setting for the first *sign* by which Jesus reveals his glory (John 2:11). Jesus transforms water provided for ritual purification into an abundance of wine for celebration — not merely a movement, but a metamorphosis, from a reminder of ritual uncleanness requiring repeated purification to a celebration that reveals and anticipates the fulfillment and completion of God’s promises in Christ.

This action adorns marriage not merely as a recapitulation of creation, but as a part of the “new creation” — the water of creation not simply replaced or supplemented, but transformed into the new wine of the messianic banquet (Brown, 97-111) This banquet is figured in Revelation in the wedding of the Lamb and the New Jerusalem. Thus a sort of grand rainbow arc proclaims God’s goodness from Genesis to Revelation, and links beginnings and endings, hope and fulfillment.

At the same time, Scripture itself offers little insight into marriage as it is lived out — witness the relatively small part that monogamous married couples play in the Hebrew Scriptures and in the early life of the Church, which leads to the relative shortage of suitable biblical texts available for use in marriage liturgies. So it is to how the liturgies make use of Scripture that we would turn for greater insight into how the Church itself understands marriage, and the theological and ethical implications the Church draws from it. It is significant that the account of the wedding at Cana plays a principal role in this, rightly highlighting the transformative quality of marriage, in which two become one, and the relationship into which they enter gives a glimpse of the redemptive qualities of mutual self-giving, reflective of the new life in Christ that is the Church itself.

### **Union of heart, body, and mind**

The classical Anglican marriage liturgy (1549-1662) betrays a degree of tension even in the introductory exhortation that serves as the liturgical prologue to the rite: the recollection of the transformative vision of the wedding at Cana is firmly planted next to distinctly earthly “causes” or purposes for the institution of marriage — including deliverance from the defiling snares of fornication. There is a palpable “already, but not yet” quality to this rite, which in its classical form includes the negative language alongside more positive references.

There is also significant tension between the *causal* or *purposeful* mode of the prologue and the active language of the vows themselves. The prologue — in particular, in its classical form, its emphasis on procreation — concerns itself with a productive value of what comes out of the marriage, what marriage is for. In contrast, the vows themselves focus on the *performative* aspect of what goes *into* the marriage, how marriage is actually to be lived out.

The emphasis on procreation and children — however important the former, and however crucial the welfare of the latter to human society — primarily as a purpose or end, relies on an ethic at odds with the principle outlined above, which is that people are to be treated as ends in themselves, rather than as means to another end, however good that end might be.

The same can be said for the spouses' use of each other as a "remedy for fornication," a cause for marriage that cannot help but avoid a degree of objectification. (This *remedial* cause — highlighted in earlier Anglican liturgies — has been downplayed or entirely omitted in more recent marriage liturgies.)

Procreation can become a problematical cause or purpose when it is understood primarily as an extrinsic end, rather than as the natural outgrowth of the loving couple treating each other as ends in themselves. It is acknowledged that as the end in this case is a human life, it has its own inestimable worth. It must also be noted that many, if not most couples, desire this end and work together toward its accomplishment; and that the generation of new life is a tangible expression of their mutual love.

However, although sometimes held as a *principal end*, it has never been held to be an *essential* one. Even the 1549 liturgy recognized that this particular end cannot be achieved by all marriages, by providing that the prayer for the couple's fruitfulness in procreation is to be "omitted where the Woman is past childbirth." These additional factors highlight that this aspect of marriage is about achieving an end, or not; and however good that end, that goodness does not remove the ethical problems that can arise when people treat each other as *means* by which some other end — however good — is achieved.

Children are a gift and a grace and a hope — but ought not be understood as an *extrinsic* expectation or demand, in the absence of which a marriage is deemed to have failed in some *intrinsic* way. Moreover, the greater and more fully realized the love of a couple for each other, the more likely any child who becomes part of the growing family, by birth or adoption, will be nurtured and raised in a way that expresses the familial virtues. A bad marriage is unlikely to be "saved" by the introduction of children, which may add more tensions and stresses to it: this is hardly fair to the child.

It can be observed that the emphasis on procreation represents a Genesis 1 attitude, while an emphasis on companionship reflects the narrative in Genesis 2. However, it is also helpful to note that Genesis 1 does not employ marital language, and procreation is more closely tied to sexuality (being "male and female") and to the "filling of the earth" — language echoing that applied to the birds and the fish in the previous verses, also commanded to "be fruitful and multiply" so as to "fill the waters" and the sky. The emphasis in Genesis 1 is on sex as necessary for procreation, not marriage.

The emphasis in Genesis 2, however, is companionship — that the human one should not be alone — rather than on filling the earth and subduing it. The "Adam" itself (Heb. *ha Adam*) is "Earth" by name and by origin, and cannot be satisfied by the companionship of the other creatures, themselves crafted from the same soil. Only one made from Adam's own substance can stand as a suitable companion, and it is Adam's recognition of this likeness that confirms the Lord God's work, the solution to the "not good-ness" of his former isolation.

The "problem" to be solved is innate in Adam, in his own solitary existence, and it is the discovery of the "helper suitable" that the problem finds its solution, not any subsequent act or production. Variable times of "prosperity and adversity" will lie ahead, but the role of suitable — not subordinate — helper through it all is a constant. (The man's later dominion over the woman is an artifact of the fall. "In the beginning" the couple stands side by side. The Hebrew word for helper is used of God in relation to humanity, so no inferiority or subordination is implied in this term. In fact, it is the one who needs help who is arguably the inferior.)

Some have noted that Jesus combined the two Genesis accounts in his teaching on marriage in Matthew 19:4-5, citing the creation of "male and female" and the "one flesh" joining as the source for holding marriage to be indissoluble. This passage receives considerable attention in the paper on marriage as vocation. However, in terms of the ethical concerns raised here, it is important to note that the indissolubility of the relationship is the focus of Jesus' concern, not sex as such or sexuality.

Moreover, Jesus was likely teaching in Aramaic in which, as is the case with the Hebrew of Genesis 1, the words *male* and *female* are nouns, better translated as “a male and a female” so that, as Jesus says, “the two shall become one flesh” (in contrast to the Hebrew of Genesis 2:24, which includes no number). In the same way, and using the same text, the Dead Sea Qumran community also informed its teaching on marriage discipline, asserting the divine rule for monogamy on the basis of God only having created “a male and a female” (Damascus Document 4:20f). Both in the Qumran community and in the teaching of Jesus, the focus is on the couple as a couple, not on the productive value of procreation.

From the beginning of the Church’s reflection on the substance of marriage, including the recorded teaching of Jesus himself, the primary emphasis of marriage, expressed in the vows — the essence or substance of the marriage — lies in the spouses themselves and in the indissoluble union of heart, body, and mind that is achieved by means of that marriage.

Still, it is fair to note that, in a way, the tension between the two creation accounts (except as harmonized by Jesus) reflects a tension that is carried forward in the classical Anglican marriage rite: a tension between the prologue and the vows. For, as with the second creation account, there is no reference to procreation in the vows themselves — unsurprising in itself, for who could make such a solemn promise?

This suggests an awareness on the part of the composers of the rite that while a productive or ends-achieving ethic of utility may underlie the expectations of the prologue (as they do the creation of humanity in Genesis 1), a duty- or virtue-based ethic informs the vows, the couple turned to face each other, finding in the other the one “suitable” to each, and fulfilling both the vows and each other in their shared lives. The tensions in the rite between prologue and vows, as in Genesis 1 and 2, reflect a distinction between two models for understanding marriage: “dynastic” — productively looking toward the next generation — and “conjugal” — performatively focused upon the love of the couple themselves.

The emphasis on procreation stands as the first “cause” of the traditional prologue, as it does in Genesis 1, and also in current discussions on marriage, even though most current marriage liturgies have reduced the emphasis upon it, noting that it is provisional rather than essential, intrinsic, or inherent in marriage as marriage. As noted above, even the earliest Anglican rite of 1549 recognized that the productive value, while important, could not be understood as *necessary*, since not all marriages lead to procreation.

This is perhaps a tacit admission that, as Kant would put it, the principal end of marriage must be found in the couple themselves, and in their life together, as well as in a pragmatic recognition that marriages are not always procreative even when that is the couple’s intent — and a couple incapable of procreation cannot reasonably intend it — but they are always meant to be loving and faithful. As noted above, a child coming into a loving and faithful context, whether by birth or adoption, is more likely to grow to be a loving and faithful person.

Another reason for finding the locus of the sign of marriage incarnate in the couple themselves lies in language added to the vows and included in the prologue in 1549. As Diarmaid MacCulloch helpfully notes:

... [Cranmer] newly added the promise by the groom “to love and to cherish,” and by the wife “to love, cherish and obey,” as the climax of their vows to each other. And for the first time in an official liturgical marriage text, marriage was announced as being “for the mutual society, help, and comfort that the one ought to have of the other, both in prosperity and adversity.” Few medieval theologians would have extended the reasons for marriage beyond the avoidance for sin and the begetting of children; the classical list of Thomas Aquinas was *fides, proles, sacramentum*, with no mention of enjoyment. However, the Archbishop had had at least 16 years’ experience of Margaret Cranmer’s society, help, and comfort in prosperity and adversity when he and his drafting team finalized these words. This was an innovation that his married friend Martin Bucer greatly approved so much that when Bucer was

suggesting his revisions for the 1549 rite, he unsuccessfully urged that it should be moved to appear as the first of the three stated reasons for marriage. (MacCulloch, 421)

It should be noted that Bucer has finally had his way: the American BCP 1979 reordered the prologue's "causes," as has the revised version of the prologue in the English Common Worship Marriage Service. American versions of the marriage liturgy, dating back to 1785, had originally removed all causal language from the prologue, thereby placing emphasis upon the estate itself, and the couple entering it by means of their vows, rather than upon its intentions or outcomes. Causal language was reintroduced in the 1979 BCP, but reordered so as to place emphasis on mutual joy and support as the best locus for the possible procreation and nurture of children.

Unlike the language of the prologue, the vows are unconditional; they are not based on purposes, ends, or goals. The duties described in the vows all relate to the couple themselves, and to their mutual behavior toward one another. Moreover, the vows are to perform things of which they are capable *in themselves and for each other*; and thus the absence of a vow to have children; even if it is an intent, its fulfillment cannot be *promised*, or made a *condition* or *basis* for the marriage at its outset or in its continuation.

Infertility — the inability to procreate — is neither an impediment to marriage nor a cause for divorce or annulment of marriage. (It has to be acknowledged, however, that where a "dynastic" model has been primary — literally so in royal marriages — infertility has played a part in finding ways to end marriages.)

Ideally, the spouses find in each other an appropriate end, rather than the means to some other end or objective, however good. Procreation does have virtue, in the bringing to be of human life, and it is a good toward which human endeavor in marriage is well intended when possible, growing out of the love of the couple for each other, rather than simply as an intended (or unintended) consequence.

But it is also important to note that the love of a couple for each other can result in other goods for the benefit both of the couple and the society of which they form a part, even when procreation either cannot or does not take place. There is a generativity that comes with the "mutual society" of marriage and which spills over to the larger society in which the couple lives and participates. It is perhaps good to note that the water jars at Cana were filled to the brim, and that the very act of dipping out the wine must have caused some overflow. The sheer abundance of goods that flow from the good of the couple's mutual self-giving is multiplied and expanded in a social setting.

This is perhaps nowhere so eloquently expressed as in the case of couples who adopt children whose biological parents are unable or unwilling to raise them. It is no accident that adoption is also a powerful Pauline metaphor for the church, set beside marriage in Ephesians (1:15) and primary in Romans 8 and Galatians 4. The paper on marriage as vocation expands upon this understanding of generativity and fruitfulness, in particular as an acknowledgement that we are all children of God by adoption.

### **Love as context and fulfillment**

"Love" is a loaded word. It can, in the present context, all too often be understood only in the sense of *romance* or *affection*. Love, like marriage, is not just about romance or affection, although it can and should include them.

Love is rightly to be understood in terms of the will as much as of the emotions. It is in this sense that love forms a part of both the betrothal promises and the vows. Each member of the couple is asked, "Will you love ...?"; and promises that they will, and then vows "to love and to cherish ..." So the problem is not that love has somehow become mixed up with marriage. The problem is that love — and marriage — have been misunderstood to be primarily about romantic feelings, and not about the commitment of each to the other in a mutual self-giving to and for the other, permanently and exclusively.



Fidelity within marriage is supported by the active will to love. In this sense, marriage is love made real, literally personified in the couple who lives out those vows, just as Jesus Christ revealed that the “greatest love” in giving himself for the life of his friends — not in marriage (except as understood figuratively in his marriage to the church), but in his life, passion, death, resurrection, and ascension — which is the “mysterious” message of Ephesians.

Although it has been suggested that until the 20th century, marriages were concerned primarily or narrowly with property and progeny (an impression fueled largely by a focus on legal matters and the concerns of the propertied classes, sometimes literally “dynastic” in reference to the nobility or royalty), this view tends to ignore the rich evidence that attests to the importance of love and personal attachment in marriage, even among those very propertied classes and royalty. Where, after all, would Shakespeare be without love and the marriages it leads to?

More important, the biblical testimony bears witness to the contrast between the dynastic and conjugal models. This distinction is well documented in the Genesis account of Jacob’s toil for his beloved Rachel and his disappointment with the discovery that Leah has been substituted as his bride — the situation of the two women representing a conflict between personal love and cultural conventions.

Similarly, Elkanah put this in numerical terms when he comforted his childless wife Hannah with the touching reminder that he is dearer to her “than ten sons” (1 Samuel 1:8). Even in a culture and religious tradition in which procreation was seen as the first commandment, and which allowed divorce or polygamy on the basis of infertility (as in Elkanah’s case), we have a poignant witness that a loving marriage is not necessarily about having children. Love is generative even when it is not procreative.

Karl Barth put this internal focus on the couple in clear terms, laying particular stress upon the account in Genesis 2. In what might be seen as a rebuttal to the causal language in the classical marriage liturgy’s prologue (in particular the emphasis on procreation and avoidance of sin), he says:

[M]arriage as a life-partnership cannot be made to subserve the mere purpose of satisfying sexual needs ... fulfilling the impulse for procreation and training of children and therefore the ends of the family ... [It] is not a means to an end, but a life-form *sui generis* to be maintained and developed according to its own inner meanings and claims ... Marriage is not subordinate to the family, but the family (the relationship between parents and children which is itself an independent form) to marriage ... It subsists even without founding a family, even as the life-partnership of a possibly childless marriage. Marriage is necessarily *coniugium*, but not necessarily *matrimonium*. (Barth, 188)

That is, the spouses, but not necessarily parents, are always joined together. The 1978 report of the Church of England Marriage Commission stated a similar conclusion. Although it begins, demurring from Barth’s outright rejection, with an affirmation that marriage “caters for certain fundamental and universal human needs and potentials,” among which are the provision of “a secure and stable environment for the nurture of children,” it continues by observing:

[W]e do not believe that ... marriage is best understood as “for” children. We, on the other hand, wish to affirm that marriage is best understood as “for” husband and wife. It is their relationship with each other which is the basis of marriage. On this is built their relationship with their children. Arguments, therefore, in favour of the life-long nature of the married relationship must be seen to stem from the character of the husband-wife relationship itself, whether or not there are children. (General Synod 1978; 86, 33)

This echoes the teaching of Jesus in Matthew 19: the permanence of the couple rests on the fact that they have become one in marriage. As noted earlier, in reflection on marriage as a “sign of Christ’s love for the

Church,” marriage forms the context in which loving spouses “become who they are” — a spouse “becomes” a spouse by virtue of relation to and with the other spouse.

Children can be conceived and born and raised apart from marriage, but marriage itself only exists between the spouses and in the context of their marriage, and it is marriage that makes them spouses, as they make the marriage, and it is the commitment to a lifelong, loving, faithful relationship — stated in the vows — that distinguishes marriage from other more casual forms of relationship.

As argued earlier, there is no real abstract “institution” of marriage but only actual, realized, incarnate instances of marriage. The ethical good that resides in real marriages — like any real “good” — is not theoretical but practical; it rests on the degree to which mutual love is expressed unconditionally, faithfully, and permanently, growing out of a union of heart, body, and mind.

It might be helpful to look at another family relationship in a similar light: The estate of being a “father” or a “mother” comes to be with conception and birth — biological processes shared by humans with many species. But being a good parent involves much more than the biological; and, most important from a biblical standpoint, parenthood is an estate that can be entered into by adoption, in which a new relationship is formed based not on a genetic heritage but on a commitment to responsibilities and the acquisition of new rights. Marriage is always such a voluntary commitment. The importance of choice or being chosen is explored at greater length in the paper on marriage as vocation.

This *elective* or *volitional* understanding of marriage — based on choice rather than necessity, on will rather than compulsion — can frame marriage as an “end” in eschatological terms, an end-in-itself anticipating but also making real some of the foretaste of the consummate joy of the union of all members in Christ the head. In this it rightly reflects the celebratory wine of Cana rather than the purposeful water of purification.

Understood in this way, marriage can take a place next to celibacy as an eschatological sign, separated from the purposefulness of marriage for procreation — necessary in this world to continue the species, but no longer needed in “the resurrection” (Luke 20:34-36). An earthly marriage can serve, as Paul suggests, as a “sign” of the mystical marriage given further elucidation in Revelation (19, 21) — of the Lamb and the New Jerusalem — a marriage in which procreation is not posited, as “the children of God” (by adoption) have been incorporated into the bride herself, whom Christ loves as his own body.

So it is that the primary “good” of marriage, its primary moral and ethical value, lies in the extent to which the couple express the love with which Christ loved his body and the Church, and in how they fulfill the mutual duty to have and to hold, to love and to cherish, and to forsake all others to remain faithful until the end — as an apprehension of the eschaton, a sign of the reign of God rather than the continuation of an earthly realm. The loving context in which and by which marriage enfolds the couple becomes an enacted parable for the community of the Church, as it “preaches Christ” to a wider world.

The implications of this understanding, in light of Barth’s observation that “the question of posterity has lost its decisive significance in the time of the new covenant” (Barth, 189), opens a helpful path by which to explore the moral value to be found in all marriages, including same-sex marriages, as such couples can, as spouses, fulfill all of these moral duties.

It is not the respective maleness and femaleness of a couple that make them “suitable helpers” to each other, but rather the extent to which the couple can in fact serve each other as a “help and comfort in prosperity and adversity” and in “mutual joy.” As with Adam’s initial choice, and God’s tolerant waiting on Adam’s decision, it is up to each human being to recognize the helper suitable to each.

**Facing the challenge**

The biblical and theological framework described in this report could be critiqued for selecting and highlighting some elements of the tradition — scriptural, liturgical, and canonical — at the expense of others. However, this is no less true of the prevailing “traditional” view of marriage, which has emphasized or downplayed different aspects of the wide range of material available, beginning with Jesus himself, who dismissed an aspect of the Law of Moses, describing it as an allowance not in keeping with the more fundamental nature of marriage. That most churches, including The Episcopal Church, have also since nuanced Jesus’ teaching on the indissolubility of marriage is perhaps worth noting. See the paper on the history of the canon law for details.

This paper has attempted to examine the moral aspects of marriage. In doing so it has drawn on Scripture, emphasizing the importance of dutiful, mutual love and service rather than dominance and submission. In the past the tendency has been to fix proper roles on the basis of gender by highlighting some aspects of the scriptural testimony at the expense of other aspects. For example, in Pauline writings, concepts of male headship came to be read apart from his equally clear call to mutual submission (1 Corinthians 11:3,11-12).

It is always a challenge to distinguish between elements of the tradition — including those recorded in Scripture — that truly reflect God’s will as opposed to the overlay of human culture and custom. We have tried to elucidate that moral values of love, care, fidelity, and mutuality lie at the core of the meaning of marriage. In doing so, our hope is to provide an authentic framework for reflection on the virtues that can be displayed in all marriages, thereby strengthening all marriages by this testimony.

It may seem ironic, given his negative words on homosexuality in *Church Dogmatics* III.4, to have brought Karl Barth back into the discussion. However, conversation from late in his life, attested in a letter from Eberhard Busch written at Barth’s direction, reveal that he had second thoughts about what he referred to as his “incidental comments” about homosexuality in his earlier work, his openness to revisiting the subject, and his regrets that his health and energy did not allow him the scope to undertake a formal reevaluation (Rodgers, 114).

The Church does not have the excuse of such fatigue or lack of energy, and it is incumbent upon it to do the best it can in its careful consideration of the theology of marriage. In this effort, the questions, “Can a same-sex couple serve as an image for Christ and the church?” and “Can the moral values evident in Christ’s self-sacrificing love be lived out by a same-sex couple?” will have to be answered in light of the foregoing discussion.

In that light, the answer to both questions is the same as it is for a mixed-sex couple — that is, in the affirmative, that a couple who love each other sacrificially, mutually, faithfully, and exclusively are reflective of the love of God in Christ, to the extent that human flesh is capable of bearing that reflection.

Clearly, some difficulties remain, and for some these difficulties are insuperable. It is sometimes said that the reason only a mixed-sex couple can marry is based on the fact that only such a couple demonstrates a kind of complementary “unity in difference.” Proponents of traditional understandings of marriage often claim that since same-sex relationships do not reflect this complementarity, such relationships represent an intrinsic disordering of God’s creative ordering of human sexuality, and so ought not to be blessed.

So too, others assert that although same-sex relationships should be blessed as a distinct good that the Church has now discerned, nevertheless traditional marriage as many now understand it should retain a privileged status in large part due to the complementarity of the couple. These ideas are explored at greater length in the essay on marriage as vocation.

However, it is worth noting once more that it is not in the sex-difference, or in sex itself (whether understood as the sex of the bodies involved or the sexual act) that moral value lies. The traditional teaching of the relationship between sexuality and marriage is that it is the latter that sanctifies the former. Sexual acts outside of marriage — whether adultery or casual sex — are culpable on moral grounds due to the lack of (or violation of) the moral values of commitment, fidelity, mutuality, and exclusivity; so it is not the sexual acts themselves, or the relative genders of the couple who engage in them, that are morally good or bad, but the context and relationship of the actors that make them so.

There is a tension between what tradition has generally deemed to be intrinsically wrong and what many in the Church discern as manifestly good in particular same-sex couples. We discern similar sins and goods in particular heterosexual relationships. In short, sexuality is not in itself the locus of morality.

Rather, the location of the goodness of the metaphorical “tree” lies in its fruit (Matthew 12:33): and “the fruit of the spirit is love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control. There is no law against such things” (Galatians 5:22-23). Moreover, within the context of marriage, sexual abuse, exploitation, or domination are moral failings; so it is not marriage in itself that leads to holiness, but the faithful and mindful enactment of the loving disciplines, rights, and responsibilities expressed in the marriage vows reflecting the love of Christ for his body, the Church.

#### 4. Reflection on the Vows

N. and N., you have come here today to seek the blessing of God and of his Church upon your marriage. I require, therefore, that you promise, with the help of God, to fulfill the obligations which Christian marriage demands. (BCP, 433)

These words begin the liturgy for the blessing of a civil marriage in the Book of Common Prayer. This rite is used for those couples already married in a civil ceremony who desire, as the liturgy states, God's blessing and that of the Church upon that marriage, and then make promises consistent with those made in The Celebration and Blessing of a Marriage (BCP, 424).

As we explore what makes a marriage holy or what makes a marriage a Christian marriage, we can take the opening words of this liturgy as a clear indicator of what is intended in marriage — what it is upon which the blessing of God and the Church is to be invoked; the *substance* of the marriage that is to find concrete fulfillment in the couple's faithful living of their solemn vows, enacting the obligations which Christian marriage demands. “Obligations” and “demands” are strong words that indicate to the couple and to all who witness the rite the seriousness of that to which they are committed. These words echo the caution in the opening exhortation of the marriage rite itself, which reminds the couple that marriage “is not to be entered into unadvisedly or lightly” (BCP, 423).

This is holy and serious business — holy in part because it is held up as such by the Church as witnessed to by our liturgy. The act of blessing that which already is — in this case the marriage and the couple — is both a recognition and a consecration, a graced moment between what has been and what is to be.

In 2000, General Convention adopted Resolution D039, which sets out expectations that the Church has of lifelong, committed, monogamous relationships. These expectations witness to the “obligations which Christian marriage demands.” The resolution lists the expectations that the Church holds dear in all such relationships, saying they will “be characterized by fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables such relationships to see in each other the image of God.”

The resolution goes on to “denounce promiscuity, exploitation, and abusiveness in the relationships of any of our members” and emphasizes accountability by stating “this church intends to hold all its members accountable to these values.” This is a profound statement solidly based in the ethics and virtues, the demands and obligations of holy living.

In many ways, the resolution builds on and even strengthens the actual vows in the prayer book (BCP, 427). Expectations are clear, and accountability is clearly stated. Most important, God is in the midst of it all, as the kind of love needed to accomplish these expectations will be *holy love* that shows forth the love of God and reminds the couple to seek and serve God as imaged in each other. When they do this, they become an icon of the love of God to the wider community.

The vows in the BCP (427) are ancient and familiar, powerful in their own right. Each member of the couple proclaims the vows to the other, in the Name of God. As the true ministers of the rite, the couple makes these solemn vows before God and witnesses — but the vows are made directly to each other. The familiar words remind all couples of the difficulties they face in marriage — better or worse, sick or well, rich or poor, through all this and in spite of any subsequent conditions short of death itself, the will to love and to cherish remains as the chief obligation and duty. The use of “cherish” adds to the promise to love an implication of a tenderness of affection that gives a glimpse of that special, unconditional love that God has for us, and which Christ has for his bride, the Church.

### **The demands of marriage as the site of blessing**

What does Christian marriage demand? Both resolution D039 and the BCP marriage liturgies link the solemn vows with God. Seeing the image of God in your spouse, asking God's blessing upon your union: these liturgical acts and exhortations wrap these powerful promises in holy language. This same holy language is even echoed in the liturgy Thanksgiving for Adoption of a Child (BCP, 441) that allows the child, if old enough, to “take” his or her mother and/or father. The taking is mutual, and a family is the result, blessed and marked liturgically.

When exploring how our marriage vows help us understand what makes a marriage holy, a brief glance at some history is helpful. The current vows in the 1979 BCP continue to use phrases such as “to have and to hold.” This was originally intended to protect the rights to property and the “taking care of” the bride. Previous iterations included words about the dowry. Marriage as a contract that had to do with property, rights, and inheritance had little or no theological underpinning.

However, as deeper reflection on the moral and theological virtues was undertaken, the Church took a higher view of the vows, while retaining some of the old language. Eventually, the promise of the bride to “obey” was removed, making the vows identical for both bride and groom. The vows evolved into holy language intent on sacred promises to each other made by the true ministers of the rite, focused on covenant terms that not only bind the couple together, but also remind us of God's covenant promises to God's people.

As noted above, Cranmer's expansion of the vows in the 1549 prayer book led even more to casting the demands and obligations as *sanctifying* love more than as merely contractual fulfillment. The 1979 BCP moves us further in that direction, and resolution D039 from GC 2000 continues that pattern in more specific terms and extends the expectations to unmarried couples in committed relationships. It is the commitment that transforms the relationship from casual to faithful, and it is the commitment that is sanctified by the blessing of the Church.

What makes a marriage holy? For Christians, the solemn vows of fidelity and love until death are promised and made, and the gathered Church witnesses and blesses this new commitment. “From this day forward” the couple “takes” each other, creating a new reality in their union as one in heart, body, and mind. It is this

relationship that has been imbued with the Holy Spirit through prayer and blessing in the Name of God, which points to what makes a marriage holy.

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## ESSAY 2: Christian Marriage as Vocation

### Introduction: A Vocation to Study Marriage

In this moment in the life of The Episcopal Church, we are in active, church-wide discernment on several fronts about how we are called to proclaim the Good News. We do this work grounded in an array of contexts within The Episcopal Church, mindful of our membership in the Anglican Communion and the wider Body of Christ. By passing resolution A050 and forming the Task Force on the Study of Marriage, the 77th General Convention in 2012 identified the study of marriage as an important component of that wider discernment.

The work of this Task Force has emerged from a series of conversations over several decades on our understanding of human difference and how the Church is called to honor and embody that difference. This paper operates on the premise that this ongoing conversation is an important facet of our central mission: to be agents of Christ's ministry of reconciliation in the Church and in the world.

It also proposes that just as we are coming to recognize the place of this conversation in our wider ecclesial vocation at this moment, we also have an opportunity to consider — or perhaps, more accurately, to reconsider and in some ways to reinterpret — Christian marriage as a vocation. It presents marriage as a spiritual practice, a particular vowed manner of life meant to be engaged over the course of a lifetime. The sections that follow unpack that vocation more fully: a call to love, to union in the midst of difference, to fidelity and stability, to growth and generativity, and ultimately to eschatological communion with God and one another.

### 1. An Emerging Framework

More immediately than the Church's decades-long conversation, reflections received by the Task Force during this triennium helped crystallize this paper's vocational framework. As the Task Force met, publicized its work, and received input from various corners of the Church, one theme (among several) that surfaced repeatedly was a concern about how marriage has factored into our collective ecclesial conversations in recent years. This message was, essentially: do not overemphasize the significance of marriage within Christian life. Do not make it the absolute center, the end-all, be-all of human relationships. Remember singleness. Remember friendship. Remember the emerging web of intentional communities in which units of family, of holy households, are in various quarters being discovered anew. (Some of this feedback is also reflected in the Task Force papers on the history of Christian marriage, marriage as a rite of passage, and changing trends and norms.)

Single people asked please not to be relegated to second-class citizenship.<sup>1</sup> Some couples reported struggling with ecclesial pressure to marry either before they were ready to do so or despite not feeling called to do so. This strain of feedback also tended to emphasize the ways in which Christian marriage has been entangled historically with patterns of social inequality and injustice (as reflected in the Task Force papers, "A History of Christian Marriage" and "Changing Trends and Norms in Marriage").

Mindful of this particular feedback, it is important to underscore that marriage is a manner of life that should not be assumed or imposed but freely discerned. In the Gospel of Matthew, Jesus acknowledges that marriage is not a universal vocation. In response to the disciples who wonder aloud whether it might be

<sup>1</sup> As the Primate's Theological Commission of the Anglican Church of Canada on the Blessing of Same-Sex Unions has written, "It is clear that, while Christianity has historically upheld the sanctity of the single state, regardless of whether or not it is lived out in the context of a vow of celibacy, there have been and are now many cultures that expect each person to be part of a couple or family, and are suspicious and judgmental of any expression of the single life, including celibate clergy." The St. Michael Report, Section 18. See <http://www.anglican.ca/primate/ptc/smr/>.

“better not to marry” given Jesus’ strong strictures against divorce, he replies that “not everyone can accept this teaching, but only those to whom it is given” (Matthew 19:11).

To assume that marriage is a universal, default manner of life to which all adults are called would implicitly devalue those who do not marry. Indeed, as David Runcorn has argued in the context of the Church of England’s conversation, “part of the gift of this debate [concerning sexuality and marriage] is that it is reminding the Church that human beings need a wider range of relationships in community than just the model of marriage.”<sup>2</sup>

Further, to assume that marriage is a universal human vocation would belie important New Testament witnesses that critique marriage or emphasize singleness. In his first letter to the Corinthians, for instance, Paul wishes that “all were as I myself am” — that is, single and celibate. But, he continues, “each has a particular gift from God, one having one kind and another a different kind” (1 Corinthians 7:7).

In the Gospel of Luke, Jesus asserts that while “those who belong to this age marry and are given in marriage, those who are considered worthy of a place in that age and in the resurrection from the dead neither marry nor are given in marriage” (Luke 20:34-36). As much scholarship has shown (including the Task Force paper, “A History of Christian Marriage”), the New Testament is far from univocal in its portrayals of marriage, whether affirming or critical.<sup>3</sup>

Yet even if biblical and historical descriptions of marriage have varied, even if marriage has been critiqued justly for its long tendency to be embedded in patterns of social privilege and injustice, Christian marriage need not be summed up by this history. Neither should it be reduced to an unthinking concession to social custom or ecclesial conformity.

Indeed, Task Force feedback also reflected a desire for theologically robust reflection on how Christian marriage emerges from the richness and complexity of our tradition. Couples, as well as single people anticipating marriage down the road, reflected a desire to discern carefully whether and when they might be called to marriage. How might they know if they are ready to marry a particular person, or if they are called to marriage at all? How many of the tracks of adult life should be laid down before entering into a marriage?

Or, conversely, what role might marriage have in stabilizing and grounding lives in the midst of transition? Indeed, what relationship might marriage have to change and stability? How might discernment of a call to parenthood intersect with and remain distinct from that of marriage? These responses requested reflection on how Christian marriage might invite people more deeply into their lives of faith (a topic addressed at length in “A Biblical and Theological Framework for Thinking about Marriage”).

Underlying this range of reflections and questions was a broad query: to what forms of relationship are we being called as individuals, as couples, as communities, as members of Christ’s body? Routed through the charge of the Task Force, these inquiries helped raise a more focused question: how might a theological frame of marriage, understood as a vocation, aid the wider discernment of the Church as well as of individual church members?

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<sup>2</sup> David Runcorn, Appendix 4, in *Report of the House of Bishops Working Group on Human Sexuality* (London: Church House Publishing, 2013), 193.

<sup>3</sup> See, for example, Adrian Thatcher, chapter 3, in *Marriage after Modernity* (Sheffield: Sheffield Academic, 1999); Elizabeth Clark, *Reading Renunciation: Asceticism and Scripture in Early Christianity* (Princeton: Princeton University Press, 1999); Dale Martin, *Sex and the Single Savior: Gender and Sexuality in Biblical Interpretation* (Louisville: Westminster John Knox Press, 2006); Mary Ann Tolbert, “Marriage and Friendship in the Christian New Testament: Ancient Resources for Contemporary Same-Sex Unions,” in M. Jordan, M. Sweeney, and D. Mellott, eds., *Authorizing Marriage: Canon, Tradition, and Critique in the Blessing of Same-Sex Unions* (Princeton and Oxford: Princeton University Press, 2006), 41-51.



Now more than ever, we as a church are called to articulate marriage as a living Christian vocation, to invite its discernment as a manner of life that, both like and unlike other vocations, enables its participants to engage in their wider call to love, to union, to relational fidelity and stability, and to generativity and growth as members of Christ's body.

## 2. Vocation and Discernment

"Vocation" in this paper refers to manners of life opened up for, and ultimately received by, God's people, both as individuals and as communal members of Christ's body. It is a way of being in and engaging with the world, of ordering our life in ways that facilitate our participation in the wider purposes for which God created us, redeemed us, and brings us into newness of life.

Vocation can speak to specific life professions, to particular messages we are challenged to convey in and to the world (as in the examples of the biblical prophets and of Jesus' disciples), to modes of relationship (as in the calls to parenthood by the patriarchs and matriarchs and to Mary the God-bearer), to broader ways of engaging the world that God created (as in Paul's enjoinder in 2 Corinthians 5:20 "be reconciled to God").

Connected to vocation is discernment: the process of receiving clarity about what one may be called to do. Discernment entails prayer and reflection, conversation, new perception, and decision. It is both individual and communal.<sup>4</sup> Most important, it entails creating space to perceive and receive what the Holy Spirit may be prodding an individual or a community to do, as distinct from what an individual or community may feel inclined to do on their own. The phrase from Matthew 19:11 regarding those who are called to marriage and those who are not commonly is translated, "not everyone can accept this teaching, but only those to whom it is given."<sup>5</sup>

Yet the verb translated as "accept," *chorousin*, is also spatial. It means "to leave space, to make room," to "move forward, to advance," or "to have room for receiving" something. Space is opened for something that is "given" (*dedotai*), a gift both freely bestowed and received. Discernment creates space in a spirit of God-given freedom. As John Chrysostom (c. 347-407 C.E.) remarks regarding this Matthew 19 phrase, it is not "shut up in the compulsion of a law." Rather, because of God's "unspeakable gentleness," we are free to receive and to heed the promptings and trajectories of the God who made us and calls us.<sup>6</sup> Through this process the Holy Spirit ultimately leads us into all truth, sometimes in ways we never could have anticipated, and may indeed have difficulty bearing (John 16:12-13).

## 3. A Vocation of Love

First and foremost, marriage is caught up in the larger, more fundamental vocation of love. As Christians we are all called to respond to, to join, and to become agents of the love of God in Jesus Christ. The commandments, as Jesus summarized them, are to love God with all one's heart, soul, and mind; and to love one's neighbors as oneself (Matthew 22:37-40; Mark 12:30-31; Luke 10:27; see also Romans 13:9).<sup>7</sup> In the Gospel of John, Christ gives us what he calls "a new commandment that you love one another. Just as I have

<sup>4</sup> The report, *To Set Our Hope on Christ* (written by a group of Episcopal theologians at the request of Presiding Bishop Frank Griswold) also uses language of discernment with respect to the current church-wide conversation on sexuality and marriage. *To Set Our Hope on Christ: A Response to the Invitation of Windsor Report 135* (New York: The Episcopal Church Center, 2005), 8-9: "[W]e believe that God has been opening our eyes to acts of God that we had not known how to see before" (9).

<sup>5</sup> Matthew 19: 11, NRSV. All subsequent biblical quotations will also be from the NRSV unless otherwise specified.

<sup>6</sup> John Chrysostom, Homily 62.3 on the Gospel of Matthew in ed. Philip Schaff, *Nicene and Post-Nicene Fathers*, Vol. 10, *Chrysostom: Homilies on the Gospel of Saint Matthew* (Peabody, Mass.: Hendrickson Publishers, 1994), 384.

<sup>7</sup> Thomas Breidenthal has also argued that "true romantic love is a form of the love of neighbor." *Sacred Unions: A New Guide to Lifelong Commitment* (Cambridge, Mass.: Cowley Publications, 2006), 11. See especially, chapter 2. Breidenthal goes on to argue that "[j]ust as the romantic tradition [of the troubadours whose lyric poetry emerged around the eleventh century C.E. in what is now southern France] helped the Christian world rediscover the marriage of man and woman as a spiritual vocation, so now, as we struggle to extend our understanding of that vocation to include partners

loved you, you also should love one another.” That expression of love for one another marks us as Christ’s disciples (John 13:34-35; 15:12:4).

The first letter of John further develops that vocation: “Beloved, let us love one another, because love is from God; everyone who loves is born of God and knows God” (1 John 4:7). By loving, we come to know and to share the divine life of the One who “wonderfully created and yet more wonderfully restored us.”<sup>8</sup> “In your infinite love you made us for yourself,” intones Eucharistic prayer A of the 1979 prayer book, echoing the language of Augustine of Hippo’s (354-430 C.E.) *Confessions*. In response to that love, our whole lives form a pattern of restlessly seeking the One in whom our ultimate rest is to be found.<sup>9</sup>

Augustine’s contemporary Gregory of Nyssa (c. 335-c. 395 C.E.) envisioned that loving search as a process of stretching forth (*epektasis*), in which we participate in God’s unending desire for us. Through lives prayerfully lived, always stretching forth toward the heart of the living God, we can become vessels for the outpouring of God’s desire. Throughout our lifetimes, we open our hearts and are repeatedly filled with that desire, as God continuously expands our capacity for it. This loving vocation never ends.<sup>10</sup>

This vocation further emerges from the fundamental Christian teachings of the Incarnation and the Paschal Mystery. To love is to offer ourselves to one another, inspired by and grounded in the love with which Christ poured himself into our midst, reconciling us to the God from whom we had grown estranged. “No one has greater love than this, to lay down one’s life for one’s friends,” Jesus teaches in the fifteenth chapter of John. We respond to that love, he continues, as his friends, appointed to bear the fruit of that love in lives offered to God and to one another (John 15:12-17).

This love catalyzes us to live lives of solidarity and sympathy, in imitation of the One who is always able sympathize with us in our weakness (Hebrews 4:15). In love our lives bear witness to the mystery of resurrection life, healing our death-dealing wounds of betrayal and brokenness, refreshing and renewing our very creation. In Christ we lovingly join our own lives to the bridge he reforged between creation and the God in whose image we are made.

Our wider vocation to love can find a more particular expression through the love of two spouses for one another. It is a love that draws couples together in shared sexuality, affirming the goodness of our embodiment and desire. It is a love of discovery that delights in a lifetime of adventures lived, challenges faced, insights shared. It is a vocation that rejoices in seeing and being seen and known by spouses who can reveal to one another what, individually, they could never have perceived on their own. “It is not good that ha adam should be alone,” God declares in Genesis 2:18: “I will make him a helper as his partner.”

Spousal love can convey a deep sense of comfort in the ongoing partnership of assembling and maintaining a shared life. It can form the foundation for the birth and raising of children, the nurture of family. Thus, to speak of marriage as a vocation to love is to refer not simply to the affective state of being in love, or of falling in love. More fundamentally, the love in which Christian marriage is grounded is relational and of the same sex, that tradition emerges once again as a fruitful starting point and a rich resource for that discussion” (*Sacred Unions*, 26).

<sup>8</sup> Collect “Of the Incarnation,” *Book of Common Prayer* (New York: Church Hymnal Corporation, 1979), 252.

<sup>9</sup> Eucharistic Prayer A, *Book of Common Prayer*, 362. Augustine of Hippo, *Confessions* 1.1 in trans. F.J. Sheed, *Confessions Books I-XIII* (Indianapolis: Hackett Publishing Company, 1993), 3.

<sup>10</sup> Gregory expounds this idea of *epektasis* in several texts, including the *Life of Moses* and his *Homilies on the Song of Songs*. Note also that Gregory does not hesitate to use the term “desire” to describe the driving force of this process. For more on Gregory of Nyssa’s ideas of desire and gender, see Sarah Coakley’s *Powers and Submissions: Spirituality, Philosophy and Gender* (Malden, MA: Blackwell, 2003), chapters 7-9. See also Coakley’s *God, Sexuality, and the Self*, in which she argues that human desire originates in that of the Triune God who is ultimately “the means of [human desire’s] transformation.” *God, Sexuality, and the Self: An Essay on the Trinity* (Cambridge: Cambridge University Press, 2013), 6.

lifelong. Bounded by the vows made in holy matrimony, marriage is a holy vessel in which a couple grows and changes together over the course of a lifetime. Ultimately, in these many and various ways the vocation of Christian marriage continually invites spouses to reveal to one another, and to their wider community, the love of God in Jesus Christ.

#### 4. Union and Difference

As with love, a vocation to marriage calls couples into a particular sort of union that is always already caught up in a wider call to be one. What is often called marriage's unitive quality bears out in its own manner Jesus' "new commandment" to "love one another" and to be one just as he and the Father are one (John 17:21). This union both joins us together and rejoices in our particularity, our difference. At a fundamental, sacramental level, our call to union emerges from our baptism in which we are engrafted into the wider Body of Christ.

Throughout our lives we live out our membership in that body in various ways: as we receive communion week by week, as we seek and serve Christ in all persons, loving our neighbor as ourselves (Baptismal Covenant, 1979 BCP, 305). When we pray "that we all may be one" (1979 BCP, 387) we open our hearts to unions of affinity and difference, to friendship, to family, to wide-ranging collectives of work and home, to our Church, flung far and wide around the globe.

#### "Cleaving" and creation

The unitive vocation in Christian marriage emerges in important ways from how we have read the creation stories. As Christians, we read the stories of our creation through New Testament as well as Hebrew biblical lenses. These include Jesus' own interpretive citations. Despite his own life of (apparent) singleness and his critical reflections on ideas of family in his imperial Roman context (again, see "A History of Christian Marriage" and footnote 3 above), Jesus clearly also respects and envisions a place for marriage. As mentioned earlier, he goes on to imply in Matthew 19 that marriage is a vocation "given" (*dedotai*) to many, even as there are others to whom it is not.<sup>11</sup>

Jesus' explanation of this vocation (in 19:3-12, paralleled by Mark 10:2-12) emerges in response to a question from the Pharisees about divorce. While Moses allowed divorce "because of your hardness of heart," Jesus replies, "from the beginning it was not so." Citing the conclusion of the first creation story, Genesis 1:27, he asserts that "the one who made them at the beginning 'made them male and female.'" Without citing the Genesis 1:28 command "be fruitful and multiply," he then continues directly with a citation from Genesis 2:24: "For this reason a man [*anthropos*] shall leave his father and mother and be joined [*kollethesetai*] to his wife [*gynaiki*], and the two<sup>12</sup> shall become one flesh [*hoi duo eis sarka mian*]."<sup>13</sup>

<sup>11</sup> In Matthew 19, Jesus goes on to explain that there are those to whom what he has just said about marriage and divorce does not apply, or is not given: "For there are eunuchs who have been so from birth, and there are eunuchs who have been made eunuchs by others, and there are eunuchs who have made themselves eunuchs for the sake of the kingdom of heaven. Let anyone accept this who can." This passage has a long tradition of being read in support of the vocation of virginity or celibacy — of considering celibacy a higher calling than marriage (re: "it is better not to marry"). More recent scholarship has underscored the various roles and constructions of *eunouchoi* in Roman imperial and later Byzantine contexts, as well as the implications of Jesus' acknowledgment of people who complicate or exceed the sexual binary of male and female. See, for instance, Mathew Kuefler, *The Manly Eunuch: Masculinity, Gender Ambiguity, and Christian Ideology in Late Antiquity* (Chicago: University of Chicago Press, 2001); Kathryn Ringrose, *The Perfect Servant: Eunuchs and the Social Construction of Gender in Byzantium* (Chicago: University of Chicago Press, 2003); Walter Stevenson "Eunuchs and Early Christianity," in S. Tougher, ed., *Eunuchs in Antiquity and Beyond* (London: Classical Press of Wales and Duckworth, 2002). For contemporary theological explorations of this ancient category, particularly with regard to intersex people / people with disorders of sexual development (DSD), see Susannah Cornwall, *Sex and Uncertainty in the Body of Christ: Intersex Conditions and Christian Theology* (London: Equinox, 2010).

<sup>12</sup> As the paper, "A Biblical and Theological Framework for Marriage" also points out, in the Hebrew of Genesis 2:24 the verb is simply plural, whereas the Septuagint, which Jesus here quotes, supplies *hoi duo*, "the two."

When we marry one another as Christians we take up this created possibility of shared embodiment. We reverence God's own creative handiwork, becoming "one flesh" in new ways. Further, Jesus' citations signal the creative force unleashed when a couple shifts the balance of its relational identity from families of origin to one another. Here the verb *kollao* — to weld, to glue together, or perhaps, most accurately, "to cleave to" (as the King James Version translates it) — speaks to the complex dynamics of this creative shift. To cleave is to join at a deep level, both sexual and spiritual, to direct and channel one's deep desire. Yet to cleave is also to cut through or split, to part. The cleaving of marriage could be said to reform families by shifting their borders — often enlarging them through the inheritance of the spouse's family, but ultimately shifting the particular quality of earlier familial attachments.<sup>14</sup> Once it is vowed, once that cleaving has been liturgically enacted, to undo it is a very serious matter.<sup>15</sup> The cleaving of marriage has creative reverberations.

### Complementarity considered

Jesus' juxtaposed reading of the Genesis creation accounts has contributed to a relatively recent thread that sees in Christian marriage the fulfillment of the created meaning of male and female. And although Jesus' comments on marriage do not address procreation (again, he declines to cite Genesis 1:28: "be fruitful and multiply, fill the earth and subdue it"), the above referenced passage (and its Markan parallel) has been paired with other key texts to ground the meaning and significance of marriage in binary sexual difference as well as in the human capacity to procreate. In this way, the unitive quality of marriage has at times been conflated with the procreative capacity that many, though not all, couples possess.<sup>16</sup> The question of how the vocation of marriage takes up and expresses the wider Christian call to growth and generativity will be addressed more fully below, in section 6. Here, however, the question is whether the vocation of Christian marriage must center on the binary sexual difference of male and female.

Christian theology has a long tradition of reading marriage through the mystery of the relationship between Christ and the Church. Indeed, Christian "nuptial theology" tends to unfold the mystical interface of our Christology and our ecclesiology through the lens of marriage, dwelling in particular on the imagery of Ephesians 5, as well as on Christological readings of the Song of Songs. The task force paper exploring marriage within a wider theological arc treats the Ephesians passage at some length. The analogies between Christ and the Church, husband and wife, male and female have long been interpreted in ways that limit marriage to heterosexual couples and that instantiate an asymmetry between husband and wife. In recent decades, some Christian theologians have framed this line of thought as "sexual complementarity" or simply "complementarity."<sup>17</sup>

As Adrian Thatcher has noted, while this idea can be nuanced in different ways, including in egalitarian modes, complementarity is usually used to argue that "God has planned and ordained heterosexual

<sup>13</sup> This is an instance where the Greek term *anthropos*, often translated as "human being," when paired with *gyne*, "woman" or "wife," becomes gender specific: "man." Further, unlike in English, in both Greek and Hebrew the terms for "man" and "woman" can also be translated as "husband" and "wife."

<sup>14</sup> The Task Force paper "Marriage as a Rite of Passage" discusses how, historically, betrothal practices allowed time for the new network of familial relationships to adjust and engage in their reconfiguration and growth.

<sup>15</sup> This is why our own conversations as a church about divorce took time to sort out, concluding that divorce and remarriage in the church are possible only under careful, canonically governed discernment. See Canon 1.19 in *Constitution and Canons of the Episcopal Church* (2012), 60-61. See also the Task Force Paper on the history of the marriage canons.

<sup>16</sup> For example, Goldingay et al. read Jesus' citations of Genesis in Mark 10 (which are the same as those in Matt 19) as implicitly including Genesis 1:28. The "divine intention of the union of male and female in one flesh ... entails the social, psychological, and physical union, including the fruitfulness of childbearing as part of the order of creation." John Goldingay, Grant LeMarquand, George Sumner, and Daniel Westberg, "Same-Sex Marriage and Anglican Theology: A View from the Traditionalists," *Anglican Theological Review* 93, no.1 (2001): 1-50. See also their discussion opposing the separation of the unitive from the procreative facets of Christian marriage, pp. 40-41.

<sup>17</sup> For a description of this term see, for instance, Adrian Thatcher's discussion in *God, Sex, and Gender: An Introduction* (Malden, Mass.: Wiley Blackwell, 2011), 185-86.

marriage as the sole framework for legitimate, holy, sexual relations.”<sup>18</sup> In different ways and with distinct emphases, this idea has emerged in some Roman Catholic and evangelical Christian writings.<sup>19</sup> It has also begun to appear in some Anglican contexts.<sup>20</sup> These contributions reveal how our conversation about marriage interfaces with and activates our broader understanding of the human person. Should the basic organization of Christian marriage privilege sexual difference — more specifically, a strictly dual understanding of sexual difference as male and female — over other sorts of human difference? Should marriage work to contain or channel human differences into a basic nuptial binary of male and female?

### **Mystery of new humanity**

Here, from the fifth chapter of Ephesians, the mystery that characterizes Christ’s relationship with the Church may offer a further way in which to understand the significance of difference in the union of marriage. After a call to “be subject to one another” in marriage (as also addressed in “A Biblical and Theological Framework for Marriage”), the author of Ephesians concludes with a quotation of Genesis 2:24, the same one cited by Jesus in Matthew 19: “For this reason a man will leave his father and mother and be joined to his wife, and the two will become one flesh.” The letter then continues: “This is a great mystery, and I am applying it to Christ and the Church.” The heart of marriage, that is, is a *mysterion*.

The concept of mystery expresses several key linked ideas in Ephesians. In its first chapter, the author uses the term to speak of the Good News itself: “With all wisdom and insight he has made known to us the mystery [to *mysterion*] of his will, according to his good pleasure that he set forth in Christ, as a plan for the fullness of time, to gather up all things in him, things in heaven and things on earth.” In chapter three, the author proclaims that “this grace was given to me to bring to the Gentiles the news of the boundless riches of Christ, and to make everyone see what is the plan of the mystery hidden for ages in God who created all things; so that through the church the wisdom of God in its rich variety might now be made known to the rulers and authorities in the heavenly places” (Ephesians 3:8-10).

The content of the Ephesians’ proclamation is “the boundless riches of Christ” and “the wisdom of God in its rich variety.” This wisdom is instantiated in Jesus Christ who, in chapter two, is described as having broken down the dividing wall, “creating one new humanity [*kainon anthropon*] in place of the two” — that is, eradicating the divisions between Jews and Gentiles (2:14-16). Marriage, then, comes to reflect this mystery in chapter five as it symbolizes the relationship between Christ and the Church.

The mystery in which marriage participates, which it images forth or typifies, is of a new humanity, a union that simultaneously upholds and uplifts differences that extend beyond the sexual binary. Indeed, this mystery stretches across the rich and wise variety of creation itself. Read through this lens, marriage reflects in a distinctive manner the new humanity inaugurated by and in Christ. And in this way, once more, marriage evokes our baptism: the vocation of marriage in its own way reflects and activates the new Christic humanity into which we were baptized. We are said to have “put on Christ” in our baptism (Galatians 3:27), an act

<sup>18</sup> Thatcher, *God, Sex, and Gender*, 186. An exception to this is the argument by Deirdre Good, Willis Jenkins, Cynthia Kittredge, and Eugene Rogers, that “male-female complementarity” can be read as “typical but not exhaustive of [marriage’s] witness.” Good et al., “A Theology of Marriage Including Same-Sex Couples: A View from the Liberals,” *Anglican Theological Review* 93, no. 1 (2011): 57. Another exception is Eugene Rogers, “Same-Sex Complementarity: A Theology of Marriage,” *Christian Century*, May 11, 2011. <http://www.christiancentury.org/article/2011-04/same-sex-complementarity>.

<sup>19</sup> See, for example, Pope John Paul II, *Man and Woman He Created Them: A Theology of the Body* (Boston: Pauline Books and Media, 2006); Wayne Grudem and John Piper, *Recovering Biblical Manhood and Womanhood: A Response to Evangelical Feminism* (Wheaton, Ill: Crossway Books, 2006).

<sup>20</sup> See, for example: House of Bishops of the General Synod of the Church of England, *Some Issues in Human Sexuality: A Guide to the Debate* (London: Church House Publishing, 2003), 10 (1.2.9); House of Bishops Working Group on Human Sexuality, *Report of the House of Bishops Working Group on Human Sexuality* (aka *The Piling Report*), section 117, pp. 33-34, and appendix 4, [https://www.churchofengland.org/media/1891063/pilling\\_report\\_gs\\_1929\\_web.pdf](https://www.churchofengland.org/media/1891063/pilling_report_gs_1929_web.pdf). Goldingay et al., “Same-Sex Marriage and Anglican Theology: A View from the Traditionalists.”

through which the Genesis-specified binary of “male and female,” as well as that of Jew and Greek, slave and free, is in some sense “no longer.” In “The Celebration and Blessing of a Marriage,” Christ is said to have “adorned this manner of life by his presence and miracle at a wedding in Cana of Galilee” (1979 BCP, 423).

The union of affinity and difference at the heart of marriage might be understood most fruitfully as a mystery at the heart of humanity and, indeed, of creation itself. In marriage, our vocation is not to erase our distinctions, even as we become “one flesh.” Difference is neither eradicated nor “overcome” or transcended, but it is transformed. Our unique humanity is creatively activated, that the couple may be united one with another, becoming a new creation while simultaneously remaining two, distinct. This interplay of difference and unity in Christian marriage need not be limited to male and female, but it can be activated by all manner of human difference.

Indeed, as the Task Force paper, “Marriage as a Rite of Passage” explains, the union of difference in Christian marriages can serve as a prophetic crucible in contexts of communal strife and division. Adrian Thatcher has further asserted that “it is helpful to see the author [of Ephesians] beginning a trajectory towards a real Christian theology of marriage, which for its completion needed further time ... Being ‘subject to one another out of reverence for Christ’ (Eph. 5:21) is starting to change everything.”<sup>22</sup> Marriages of same-sex couples can also play an important role in dispelling any notion that one spouse could ever represent Christ, or the Church, more than the other. The “Celebration and Blessing of a Marriage” liturgy also signals the full equality of the couple as they carry out their role as “co-ministers.”<sup>23</sup> Therefore, although the vocation of Christian marriage has historically been limited to heterosexual couples, the mystery it illumines arguably need not require this. Marriage’s unambiguous and unambivalent embrace of the full spectrum of human difference, including that of sexual orientation, can enable it to image forth the rich variety of creation more fully than it has been able to in centuries past.

## 5. Asceticism and Stability

While love draws a married couple together, what binds and helps sustain their union over time is what might be called its disciplined ascetic quality. For Christian marriage is, as others have argued, a vowed vocation.<sup>24</sup> Its vows create a covenant that binds the two spouses together, “as long as [they] both shall live.” The spousal declaration in “The Celebration and Blessing of a Marriage” to “love, honor and keep” the beloved “in sickness and in health” and to be faithful to the beloved, “forsaking all others,” is an *askesis*, a spiritual practice (1979 BCP, 424).<sup>25</sup> It shares this vowed quality with forms of religious life in which community members make lifelong professions.

The apostle Paul reads marriage through an ascetic lens. After commenting to the community at Corinth, “I wish that all were as I am” — that is, single and celibate — he speaks of marriage as a concession or indulgence and not as a command. Marriage here works as a tether for those who are not called to a life of celibate singleness (1 Corinthians 7:6-7). Even as Paul wishes that all were like him, he steps back and points to the more fundamental vocational issue: “But each has a particular gift [*idion charisma*] from God, one

<sup>22</sup> Thatcher, *God, Sex, and Gender*, 108.

<sup>23</sup> Thatcher, *God, Sex, and Gender*, 110, and *Marriage after Modernity*, 240.

<sup>24</sup> Good et al., “A Theology of Marriage Including Same-Sex Couples: A View from the Liberals,” 51, 62-63. “These vows mark marriage as an arduous form of training in virtue, by which the promises come true that God will heal human waywardness and teach us to love (Hos. 14:4; Jer. 3:22).”

<sup>25</sup> Good et al. explain: “Our approach combines the two New Testament values of asceticism and household: marriage is a school for virtue, a household asceticism: ‘for better for worse,’ ‘forsaking all others’ (1979 BCP, 427, 424).” “A Theology of Marriage Including Same-Sex Couples,” 58. Eugene Rogers also makes this point, arguing that we ought to understand “marriage as an ascetic discipline, a particular way of practicing love of neighbor. The vows do this: ‘for better for worse, for richer for poorer, in sickness and in health, till death do us part.’ Those ascetic vows — which Russian theologians compare to the vows of monastics — commit the couple to carry forward the solidarity of God and God’s people. Marriage makes a school for virtue, where God prepares the couple for life with himself by binding them for life to each other.” “Same-Sex Complementarity.”

having one kind and another a different kind” (1 Corinthians 7:7). A few verses later, once more he underscores: “Let each of you lead the life that the Lord has assigned, to which God called you” (1 Corinthians 7:17). The particular graces or charisms gifted to each of us from God can come to their fullest fruition through the relationships and commitments we form. Christian marriage is one such pattern of life that binds the married couple to one another, to the church family in whose presence they make their vows, and to the wider Body of Christ, whose membership they now engage afresh through the lens of marriage.

The vowed quality of Christian marriage enables it to become a particular kind of relational vessel. Unique to each couple, these vessels of marriage create a sense of stability strong enough to allow the couple to support each other “for better for worse, for richer for poorer, in sickness and in health ... until [they] are parted by death” (1979 BCP, 427). These vows are meant not simply to be limit-setting promises, but also a deep source of life. Here the Johannine quality of “abiding” can illumine the vitality of this form of vowed stability.

In the 15th chapter of the Gospel of John, Jesus unfolds the metaphor of the vine and the branches, declaring, “abide [*meinate*] in me as I abide in you. Just as the branch cannot bear fruit by itself unless it abides in the vine, neither can you unless you abide in me. I am the vine, you are the branches” (John 15:4-5a). The verb *meino*, “to abide” or “to remain,” here becomes not simply a delimiting command, but a source of life. By abiding in the vine as a branch, one remains attached to that from which life emerges. To abide in John’s Gospel is to dwell in divine love, to participate in it, to be transformed by it, to share it in community. “This is my commandment, that you love one another as I have loved you,” Jesus continues, calling his disciples “friends.” The vows that help establish the vessel of a Christian marriage abide in that same love.

## 6. Vocation of Growth and Generativity

These vows of stability that help support and bind a married couple to one another also enable the couple to serve as a means of grace-filled growth. “The decision to give my word about my future love can be part of converting my heart,” writes Margaret Farley, “part of going out of myself truly to meet the one I love (not part of hardening my heart because of excessive fear of sanctions if I break the law that I give to my love).”<sup>26</sup> That conversion of heart can unfold through shared experience of vulnerability and trial as much as through joy and triumph. “Blessed are you, God of growth and discovery” intones a prayer from *A New Zealand Prayerbook*: “yours is the inspiration that has altered and changed our lives; yours is the power that has brought us to new dangers and opportunities. Set us, your new creation, to walk through this new world, watching and learning, loving and trusting, until your kingdom comes.”<sup>27</sup> The lifelong commitment vowed in marriage emerges from a desire to “gather up our whole future and place it in affirmation of the one we love,” even as we walk together through an unfolding future that remains unknown in fundamental ways. Our vows can ground and plant us even as love “grows into wholeness” over the course of a lifetime.<sup>28</sup>

Abiding in God and in one another, a Christian marriage responds to Christ’s call in John 15 to “bear much fruit.” Here the idea of fruitfulness is first and foremost a reflection of the broader call to growth as members of Christ’s body.<sup>29</sup> As Paul urges in his letter to the Romans, we are called to align ourselves with the New Covenant, “to bear fruit for God” (Romans 7:4). At the same time, our own birthing is most

<sup>26</sup> Margaret Farley, “The Meaning of Commitment,” in Kieran Scott and Michael Warren, eds., *Perspectives on Marriage: A Reader* (New York: Oxford University Press, 2007), 155.

<sup>27</sup> A concluding collect from the Eucharistic Liturgy of Thanksgiving for Creation and Redemption, in *A New Zealand Prayerbook* (The Anglican Church in Aotearoa, New Zealand, and Polynesia, 1988), 465.; <http://anglicanprayerbook.nz/456.html>.

<sup>28</sup> Farley, “The Meaning of Commitment,” 155.

<sup>29</sup> Margaret Farley also explores an expansive notion of fruitfulness in *Just Love: A Framework for Christian Sexual Ethics* (New York: Continuum, 2006), 227-228, 290.

dramatically articulated not through biological gestation — the “be fruitful and multiply” enjoinder of Genesis 1:28 — but rather through adoption.

In his letter to the Romans, Paul declares: “[Y]ou have received a spirit of adoption. When we cry, ‘Abba! Father!’ it is that very Spirit bearing witness with our spirit that we are children of God, and if children, then heirs, heirs of God and joint heirs with Christ — if, in fact, we suffer with him so that we may also be glorified with him” (Romans 8:15b-17). Like the cry of a newborn, that distinctive parental exclamation — “Abba!” — signals a spiritual birth, a freshly forged, newly fruitful familiarity. In the same letter, this transformative kinship is imaged as an engrafting: Gentile followers of Jesus could understand themselves as “wild olive branches ... engrafted contrary to nature [*para phusin enekentristhes*] into a cultivated olive tree” (Romans 11:24). Fruitfulness, for Christians, emerges through a creation that has been made new. We are not to be conformed to this world, Paul urges one chapter later, but rather “transformed by the renewing of our minds [*metamorphousthe te anakainosei*]” (Romans 12:2). Our lives are to be not static but metamorphic, constantly transformed into the likeness of the One through whom all things were made. Christian marriage becomes generative first and foremost through this context.

A gift of the Holy Spirit, fruitfulness is the result of the cleansing from sin and reconciliation to God gifted to us in baptism, the ongoing outgrowth of the lifelong process of conversion. Through its baptismal foundation, the vocation of Christian marriage can lead us deeper into the heart of the Paschal Mystery itself. “In [baptism] we are buried with Christ in his death. By it we share in his resurrection. Through it we are reborn by the Holy Spirit” (1979 BCP, 306). Once launched, that rebirth reverberates throughout our lives. “God gives the growth,” Paul explains to the community at Corinth (1 Corinthians 3:6-7). As the letter to the Ephesians further urges: “[W]e must grow up in every way into him who is the head, into Christ, from whom the whole body, joined and knitted together by every ligament with which it is equipped, as each part is working properly, promotes the body’s growth in building itself up in love” (Ephesians 4:15-16).

As individual members of this body, Christians continually rediscover and live into the new humanity inaugurated in Christ. This humanity, referenced earlier, emerges from the dissolution of the walls that divide us from one another. It is pervaded by peace, grounded in the spirit of reconciliation that Christ bore into our midst (Ephesians 2:14-22). As we seek to live into the promises we make at our baptism (1979 BCP, 304-5), to embody this new humanity, to embrace the Paschal Mystery itself, we are caught up in the loving dynamic of a creation that in Christ, as Gregory of Nazianzus (c. 329-389) proclaimed, has been “rendered afresh.”<sup>30</sup> Indeed, our individual growth also prompts the larger communal body to mirror more comprehensively the glory of the One through whom all things were made. When we are called to bear fruit that will last, this is first and foremost what is meant.

As one disciplined means of engaging this lifelong vocation to loving growth, Christian marriage is caught up in this trajectory of transformation. Its potential fruitfulness is always bound up with this metamorphic quality. Indeed, the story of the wedding at Cana, frequently referenced as a sign of Christ’s support of Christian marriage and cited in the prologue to “The Celebration and Blessing of a Marriage” is at its heart a sign of transformation (1979 BCP, 423). In marriage, the divine power with which Christ “turned water into wine at the wedding feast of Cana” has the lifelong capacity to “transform [our] lives and make glad [our] hearts.”<sup>31</sup> In Christ, transformation itself is revealed as a crucial quality of creation’s givenness, the capacity for spiritual growth and fruitfulness. Rather than a sign of dissolution, transformation renders creation pregnant with untold possibility.

<sup>30</sup> Gregory of Nazianzus, Oration 39, “On the Holy Lights”: “What happened? And what is the great Mystery that involves us? Natures are made anew; God becomes human; the one who ‘rides on the heaven of heavens in the sunrise’ of his own proper glory and splendor, is glorified in the sunset of our ordinariness and lowliness, and the Son of God allows himself to become and to be called Son of [Humanity],” in Brian E. Daley, trans., *Gregory of Nazianzus* (London: Routledge, 2006), 134.

<sup>31</sup> From the Epiphany blessing, *The Book of Occasional Services* (New York: Church Publishing, 2003), 24.



Christian marriage forms one important relational context for the transformative generativity that Christians are called to embody. Within the vocation of marriage, “being fruitful and multiplying” thus can indeed take the form of rearing children born to parents who conceive them through the shared sexuality of their marriage. Further, this common manner of child-bearing and rearing can celebrate the goodness of the biologically creative capacities with which many of us have been gifted. This form of parenthood can take place within marriage, and when it does it can indeed be very good. Yet parenthood need not always unfold in this manner.

Further, just as not all Christians are called to marriage, not all married couples are called to parenthood. To speak of parenting in this way is not to reduce it to “an optional ‘project’ for those so inclined or for those guided by social expectations” but rather to identify it as a deeply relational vocation, a way of participating in the ongoing renewal of creation.<sup>32</sup> Those who discern a call to parenthood may not be able to have children, whether for biological, relational, or economic reasons. Ultimately, for those who do raise children within the context of marriage — regardless of whether parents and children are biologically related — parental procreativity is fundamentally adoptive.

Shaped as all vocations are by the adoptive charism of baptism, parenthood is a particular form of the call to carry forward the gift of God’s active choice: “You did not choose me but I chose you. And I appointed you to go and bear fruit, fruit that will last” (John 15:16). At its most basic level, bearing that fruit through the vocation of parenthood prompts us to grow more deeply into our membership in Christ’s body, to be agents of God’s reconciliation, participants in the graced building of God’s kingdom on earth as it is in heaven (2 Corinthians 5:18; 15:5; John 15:1-17). In various ways — for some, through marriage and for some, through parenthood, but for all through life-giving relationships with each other and with God — we are called to abide in that divine love, making known the fruit of Christ’s saving embrace (Matthew 7:16-20).

### **Conclusion: Eschatological Communion with God and One Another**

The vocation of Christian marriage is catalyzed by a love that unites two consenting adults in a holy bond, a sacred vessel in and through which they may grow throughout the course of their lives. Marriage is finite, temporal, and mortal. It is “until we are parted by death” and no longer. Yet in its characterization of the eternal union of Christ and the Church, marriage carries an eschatological dimension, extending beyond the border of created mortality. It exceeds the borders of individual souls, extending to all of creation, the ultimate renewal in which “Christ is all in all” (Colossians 3:11). In all of this, marriage serves as a vessel not only of our love, of our union in difference, of discipline and asceticism, of generativity and fruitfulness, but also, ultimately, of our transformation, our re-creation. The vocation of Christian marriage finally serves as a vehicle for engaging our lifelong communal call to abide and grow in the love through which God brought forth creation and will finally draw it homeward into God’s own heart.

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<sup>32</sup> Goldingay et al., “Same-Sex Marriage and Anglican Theology,” 41.

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**ESSAY 3: A History of Christian Marriage**

The history of Christian marriage is as complex and diverse as the history of Christianity, with the meaning of that word “marriage” having changed and morphed as generations of faithful Christians have sought to define for themselves the nature of a holy life lived out in the midst of daily life. In the same way, in varied contexts, societal and cultural understandings of marriage have interfaced and shaped our understandings of Christian marriage over the course of the last two millennia. To better understand our own contemporary understandings of Christian marriage, it is helpful to look at the historical development of marriage over the centuries.

Marriage:

- A mystical relationship preordained by cosmic forces?
- A blessed physical and spiritual union that mirrors for us a human experience akin to God’s indissoluble steadfast love as it has found expression in the life of Christ?
- A legal relationship that protects property and inheritance?
- A social relationship that forms a basic fundamental unit of almost all human society?
- A less-than-optimal but necessary religious concession to the realities of the uncontrolled instincts and passions of earthly human creatures?
- An institutional social convention that restricts and restrains the boundaries of human relationship through social proscriptions and legal constraints on individuals’ sexual expression and personal identity?
- A self-chosen, psychologically driven relationship that offers stability and intimacy for human growth and development?

When we discuss the history of marriage, of which of these are we speaking? And when we discuss the history of Christian marriage, of which of these are we speaking?

One might wonder why — when so many books have been written, and when the subject of marriage has so fully been examined at the historical, anthropological, social, economic, and spiritual levels — even include a history in our Task Force’s study of marriage? The answer is partly because not only our definition of marriage, but even our understanding of what history is has changed in the 35 years since the 1979 Book of Common Prayer authorized its modern rite of marriage.

In an earlier era, we might have drawn one long, straight line from Adam and Eve to the marriage at Cana, to the various rites of the Book of Common Prayer over the centuries, to our contemporary rites for marriage. But now we see more clearly that there is no one line of history we can follow. There are many threads woven together and interwoven with one another, creating a rich and broad tapestry of understandings, viewpoints, and insights. Attending to these various strands and the ways in which they have cohered to create some sense of communally lived experience is the work of the contemporary historian — work that may benefit us greatly as we seek to understand the concept of marriage in our own historical era.

Marriage has meant numerous things in various geographic settings over the course of history, and even now when Episcopalians use the word “marriage,” that word does not mean the same thing to all those who hear it. Part of the work of the Task Force on the Study of Marriage is to help us, as 21st-century Episcopalians spread across the globe, remember that when we speak of marriage, everyone is talking at once, meaning different things, viewing history through many contextual lenses. To understand what our moment in history has to say about the nature of Christian marriage, we benefit from an examination of the many things marriage has meant over the millennia.

This paper will explore the numerous ways in which the term “marriage” has been understood throughout the history of the Church. Perhaps it will also invite reflection on how our historical expressions of Christian marriage can enlighten our current discussions. It may even lead us beyond the boundaries of the ways in which marriage has been viewed in the past into new insights and new language, helping us develop the capacity to speak more articulately to contemporary Episcopal experiences and viewpoints.

### 1. Jewish and Roman Marriage

Because early Christianity germinated and was formed out of its Roman, Jewish, and Hellenistic cultural context, it is helpful to step back and examine some of the roots of our Christian understandings of marriage in Judaism and in Roman Hellenistic culture. We begin our historical study of the topic with a discussion of our earliest recorded ritual text regarding marriage. Scripture and Jewish history are richly full of individuals who lived in family networks, households where they were bound together in sometimes-lifelong relationships — individuals such as Adam and Eve; Abraham and Sarah and Hagar; Jacob, Rachel, Leah, Zilpah, and Bilhah, whose lives and whose stories provide the pillars for all of Jewish history that follows.

However, it is not until deep in the intertestamental period that we see an extant example of a Jewish blessing prayer used as a part of the process of marriage. In the book of Tobit there are several blessing prayers — one put in the mouth of Sarah’s father, Raguel, which seems to be a blessing at the time of the betrothal of Tobias and Sarah. A second blessing prayer is offered by Tobias and stands as a witness before God given in the wedding chamber and asking God’s blessings and mercy on their life together.

Blessed are you, O God of our ancestors,  
 and blessed is your name in all generations for ever.  
 Let the heavens and the whole creation bless you for ever.  
 You made Adam, and for him you made his wife Eve  
 as a helper and support.  
 From the two of them the human race has sprung.  
 You said, “It is not good that the man should be alone;  
 let us make a helper for him like himself.”  
 I now am taking this kinswoman of mine,  
 not because of lust,  
 but with sincerity.  
 Grant that she and I may find mercy  
 and that we may grow old together. (NRSV Tobit: 8: 5b-7)

A third and final blessing is said by Raguel the morning after the couple’s marriage, and it is in this blessing that we see a blessing on parents, children, and future generations. In this third prayer, marriage is clearly linked to procreation, continuity of family lines, and a hallowing of the future of a people.

What do we learn from Tobit? We see here that marriage was a process, a process that took some time, had several stages, and involved multiple parties, not just the couple. We see that Sarah is never asked to consent, but that her father and her new husband are the actors. Nevertheless, we see that Tobias calls Sarah his beloved — that true marriage is not about objectification of another human being (lust), but about something else, a partnership that enriches the present and protects the future of a people. Raguel asks blessings upon both Tobias and Sarah through their union. Both are meant to be blessed by marriage. We see that in this model of marriage, Sarah is the helper to Tobias — not an equal, but a lifelong helper and companion, not a possession. We also see that in this world there is a clear link between marriage and procreation, the present and the future.

Third-century Talmudic texts also shed light on what Jewish marriage might have meant in the era in which Christian marriage was beginning to be defined. Jewish marriage, by this time, involved a two-step process of betrothal, where money was exchanged, contracts were agreed to, or, in some less-ideal (but perhaps quite common) circumstances, cohabitation began. Blessings were given at the time of betrothal, and further blessings were offered later (often a year later) at the time of marriage. The second stage of marriage involved fasting, confession, crowns, a veil for the bride (if a virgin), the formal signing of a contract, music, dancing, and feasting. At the end of the meal, the groom pronounced seven blessings, including the two below.

O make these loved companions greatly to rejoice, even as of old thou didst gladden thy creature in the garden of Eden. Blessed art thou, O Lord, who makes bridegroom and bride to rejoice.

Blessed art thou, O Lord our God, King of the universe, who hast created joy and gladness, bridegroom and bride, mirth and exaltation, pleasure and delight, love, brotherhood, peace, and fellowship. Soon may there be heard in the cities of Judah, and in the streets of Jerusalem, the voice of joy and gladness, the voice of the bridegroom and the voice of the bride, the jubilant voice of bridegrooms from their canopies, and of youths from their feasts of song. Blessed art thou, O Lord, who makes the bridegroom to rejoice with the bride. (Stevenson, *Nuptial Blessing*, 245)

In the seven marriage blessings of the Talmud, we see a picture of marriage that is about love (a love that has most likely developed during the time of the betrothal or perhaps as a result of having known each other since childhood). Marriage is about joy and gladness, love and delight, and fellowship. While a contract has been signed and a legal relationship established, there is, it seems from these blessings, something more — something deeply human, God-blessed, and God-blessing that is present in the character of marriage.

In conjunction with this rich and full image of blessing-filled life together, we must remember that Jewish laws of the time also allowed for divorce, and that some of the Jewish scholars of this era of first- and second-century Judaism were emphatic supporters of a man's right to divorce his wife on virtually any grounds, from an inability to bear children to such trivial grounds as burning a meal. While marriages may have begun with visions of belovedness, for many women this moment of joy and jubilation would eventually give way to a relationship of vulnerability and subservience to the man in the house who held legal power to sever the bonds earlier established in marriage. It is also important to remember that monogamy is not inherent in this particular model of marriage, and that polygamy was practiced by some who could afford to care for larger households. Contrary to our contemporary images of marriage, polygamy will continue to be part of the definition of marriage throughout much of the history of marriage and across numerous cultures.

At the same time that Christians from Jewish traditions were fashioning a view of marriage from the cultural vantage point of Judaism, Hellenistic Christians were developing an understanding of marriage based upon their cultural vantage point. In Hellenism even more than in Judaism, the central building block of society was the patriarchal family. Survival of this unit was possible only through the movement of women of childbearing ages from one household to another. The role of women in this setting was to ensure the line of their husbands and their fathers, the well ordering of a deeply patriarchal hierarchical society, and the inculcation of Roman patrilineal values from one generation to the next. Marriage provided the societal and legal vehicle to make this possible.

In contrast to the mutuality suggested by our Jewish blessing texts, Roman marriages were understood to be one-sided in their purpose. The Roman marriage changed the legal and familial status of a Roman woman, moving her from one household to another. The stages of Roman marriage in non-Christian settings were the arranging of the marriage by a marriage arranger, a local sacrifice to the gods on the morning of the marriage, the sealing of the marriage contract along with witnesses (with household gods present), and the

consent of the father of the bride to this marriage. There was no mutuality. There was no change in the man's status. There was no direct consent by the woman, as there was no direct consent by the woman in Jewish rites.

While in loving households the daughter's desires would have been attended to, ultimately she could not decide her own fate. Fathers might — on occasion for their own interests or to provide safeguards for their daughters — arrange for a marriage that was *sine manu* and left these daughters under the father's authority rather than, as was the more typical practice, transferring authority for the woman from the father to the husband. Fathers, if the marriage was *sine manu*, also had the right to emancipate their daughters so that they became the owners of their own property and were able to function as independent agents in society. It is likely that many of the women described as supporting the work of the apostles in the New Testament operated through this kind of legal sanction.

Families in a Roman household comprised all those who were under the authority of the father. They might be wives, children, slaves, or indentured servants. One remained under the authority of the father one's whole life long, or perhaps until authority was transferred to a husband in marriage if one was a woman, or until emancipation by the father, if that was given. For much of Roman history, only free Roman citizens had the right to marry. This left much of Roman society outside the bounds of legal marriage, vulnerable to unwanted dissolution of any intimate sexual or parental relationship to which they might choose to commit over the course of their lives.

What can we learn about marriage from Roman society? We can learn that marriages can function in society as means to order that society and protect the authority and property of those in power, and that western culture has a long heritage of refusing the legal privilege of marriage to those without freedom or without means and those living at the margins of society.

## **2. Christian Marriage in the Early Church**

The early Church, through its several iterations, held various views of the nature of marriage. The first-century Christian eschatological worldview invites Christians to imagine a different kind of family from the paternalistic families of either Judaism or Rome. For these early Christians, family was found through identification with those with whom one formed spiritual bonds. Mothers and fathers were not created through either legal or genetic bonds. Mothers and fathers were those who had nurtured one in the faith and brought one from life outside the Christian community to life inside it.

Paul asserts that marriage was set aside for those who were not spiritually strong enough to maintain their chasteness in celibacy. The ideal was a celibate life spent devoting the whole of one's being to preparing for Christ's return. This new world order that is presented through Paul, the deutero-Pauline writers, the authors of the pastoral letters, and through the Gospel writers, stands in powerful, intentional, and direct contrast to the cultural mores of its day. Paul invites the Church into a way of life where none is viewed as property of another, none is objectified, and all live together in bonds of mutuality and mutual submission. One chooses as one's family members those who have chosen Christ, and the bonds that unite Christians as a family are as eternal, sacred, and nonseverable as the limbs of one's body are to one another.

While the early Church, in most communities, did not forbid marriage, the reality-forming values of the first-century Hellenistic world are turned on their heads by an approach to property, life, and family that defies the idolatry that frequently accompanied the patriarchal model of Hellenistic marriage. Marriage, in and of itself, is not seen as evil. Indeed, Christ's first miracle, according to John, was a blessing that took place at a marriage. But the attitudes and assumptions of first-century Hellenistic life that placed all authority in the hands of a human father rather than a heavenly father were found by the Church to be deeply suspect. Jesus' statements (Matthew 19:1-12, Mark 10:1-12) regarding marriage stress to his followers the priority of a life of devotion to God over any allegiance to societal or religious authorities or norms.

While Christians did engage in marriage, the ritual of marrying was not necessarily seen as a spiritual act unless it was entered into by two Christian persons who intended a relationship that would produce spiritual fruits. Not all Christians participated in Christian marriages. Christian women were strongly encouraged to bring their Christian values and ideals to their relationships, even when those relationships were with non-Christian husbands; and Christian husbands were encouraged to keep and convert their non-Christian wives. There is evidence that bishops of the patristic era questioned and contemplated the appropriateness of blessing marriages. If they happened to be in attendance at a marriage feast, they might be called upon to offer a blessing similar to what the father of the bride might offer at a non-Christian marriage feast.

But marriage rites were by nature in this time domestic rites with religious implications. Home and hearth, kin and community were aspects of life so fundamental that they were intricately related to human spirituality but less centrally focused on explicitly religious liturgical acts than what we will see in later moments of history when church and state become synonymous. While there is some patristic evidence that, in North Africa, Christian couples might have married in rites held within the faith community, there is no evidence to suggest this was common practice across the diverse geography of the early-church world or in the first generation of the Christian church.

As the Church moved deeper into the New Testament era, into the late first century and the second century, attitudes toward marriage changed in two directions. In both Hellenistic philosophy and in Christian understandings, there were strains of the tradition that grew even more deeply suspect of marriage and instead commended lives of abstinence, chastity, and singlehood as lifestyles more noble than marriage, even when the eschatological focus of Christianity had begun to wane. Because many human beings in the Mediterranean world were not eligible to participate in legal marriage because so many were slaves and not citizens, citizens and aristocrats in Roman society who were turning to Christianity as their religion wanted and needed their religion and their societal positions to come closer in line. Christianity was, in many settings, becoming less countercultural and more aligned with the practices and values of the empire, a necessary step if it was to grow beyond its first generation of followers.

The authors of the deutero-Pauline scriptural texts (scriptural texts likely written by followers of Paul after his death) and many of the early church fathers and mothers see the patrilineal ideals of Hellenism as not only appropriate to Christianity, but also as complementary to a now increasingly less apocalyptic and more present-focused vision of life in Christ. Many scholars believe that the Christian scriptural teachings about hierarchical understandings of marriage according to which the wife is subservient to the husband arise from this time period of the apostolic church.

It is also most likely that it was in this late-first-century Christian historical era that we see expressed for the first time the direct analogy that marriage represents the relationship between Christ and Christ's church, an analogy that would have easily grown out of familiarity with the several parables in the Gospels about brides and bridesmaids. This metaphor for marriage would have been understood by those hearing these letters for the first time as inherently hierarchical, and thereby in keeping with Roman sensibilities about the *pater familias*. At the same time, these passages continued to assert a Gospel message that was still countercultural to Hellenistic Roman worldviews since they assert a profound challenge to any repressive view of another as object or property.

Augustine, writing in the fourth and fifth centuries to an increasingly Christian culture, commends marriage and encourages those marrying to include the bishop in the arranging of marriages. Like many Christians of his day, his view of marriage is ambivalent, but he is clear in expressing the gifts marriage can offer to the Christian life. For Augustine, marriage was a sacred obligation, a *sacramentum*.

The reasons for marrying are threefold: fidelity, procreation, and the fulfilling of a sacred obligation. These values were deeply in keeping with the familial structure of Roman society, and still they invited those of



Hellenistic backgrounds to contemplate marriage as not simply an act requiring a sacrifice to the gods, but as an act that (particularly for brides who were the sole subjects of marriage rites in Augustine's world) was in and of itself a means of giving one's life to God's service. One loved one's husband as the Church loved Christ. If one did not have the spiritual strength or the economic resources to commit one's self to a fully devout life of celibacy, one could still choose faithfulness and a contained concupiscence. This was the next best thing to celibacy, and a proper and fitting gift of one's self to God and to Christian society.

In the patristic period, the eastern church was fashioning a somewhat different understanding of marriage. Here, too, celibacy was revered as the most holy state. However, for those who would marry, the nuptial blessings of marriage were given to both bride and groom. For both of them, the state of life and being was altered. As a central sign of this change of life status, and in recognition of the role marriage played in the spiritual life of the couple, crowns were placed on the heads of both bride and groom in marriage rites, signifying the high calling of Christ upon their lives and the eschatological nature of their life work. Bride and groom were expected to live lives worthy of this high calling given in Jesus Christ.

In its initial conversion of the western frontier to Roman Christianity, the church of the east held greater sway over the newly incubating Christian churches of Britain, Gaul, and Spain. This worldview allowed for an easier connection with Teutonic values than did the increasingly ascetic and aristocratically centered values of Rome. These eastern sensibilities would continue to influence Gallican (of what is now Western Europe) and Visigothic (of what is now Spain and Portugal) views on marriage long after Europe had been thoroughly Romanized.

What does the late patristic era tell us about marriage that might inform our present-day understandings of marriage? We see in this period of history a widening of understandings of what it means to be human in a way that does not simply equate the human condition with procreative capacities. Celibacy becomes a virtue. We see, as we saw in the early church, alternative models for how to live the Christian life — models that offered women as well as men the means to imagine a life of faith lived beyond the personal and legal confines of Roman marriage.

We continue to see a deeply stratified and diverse Christianity in which marriage is not available to all who desire it. We hear explicitly a deep suspicion of the human body and human sexual instincts, a suspicion based in part on recognition of the physical and medical dangers inherent in sexual relationships and in pregnancy in that day. We see an already present tension between the concepts of marriage as a legal and societal act and Christian marriage as a blessed state of life given by God and blessed by the Church.

### **3. Marriage in the Medieval Church**

For the Teutonic peoples who were coming to see themselves as a part of the Roman Empire and who lived away from the Mediterranean boundaries of the western church, the world-renouncing spirituality of Rome was deeply problematic. Initially the concept of celibacy as a lifelong choice was abhorrent. Monogamy was a state reserved for those with the means only to procure one wife. In this setting, marriage was not essential, but an honoring of vows and promises was critical to the maintenance of the society.

As in the rest of the Christian church, betrothal was seen as essential to a proper marriage and formed a basic contract of commitment between two households. Marriage blessings were usually domestic in nature and often took place at feasts and at the marriage beds. For people who were still coming to grips with the notion of putting aside their gods of the home and hearth, the importance of domestic elements of blessing was critical. In these Teutonic cultures in these early centuries of Christian faith, the blessing was to be bestowed not just on the bride but on the groom as well, because it was only through their mutual familial partnerships that these tribal societies could continue.

As the centuries progressed into the period we now call the Middle Ages, Roman and Teutonic values became more deeply inculcated into one another, and the medieval church took on its new character. Celibacy took on great importance across the entire empire, as did the blessing offered by the now frequently celibate priest. Domestic life came to be seen as separate from and inferior to religious life. In eucharistic celebrations, the real bread of the hearth offered at the Eucharist gave way to “holy” bread formed in monastery kitchens and made by celibate holy hands. Coupling, birthing, and the raising of children continued, but these actions had even less to do with religious life lived in God than had been true in previous eras. By the medieval period, only priests could offer a marital blessing — not, as in earlier times, fathers or grooms.

The Church required monogamy in marriage, and linkages narrower than the seventh degree of relationship were considered incestuous, further reinforcing the chasm between the very few who could engage in blessed legal marriage and the vast majority who were forced to live, or were desirous of living, outside its boundaries. In a time of deeply concrete biblical literacy within the official church, those who entered into solemn marriage entered into an indissoluble state.

What marriage was, how it happened, and who was eligible to be married were matters of debate in this era of the Church. A marriage might involve a simple blessing by the priest at the doors of the church, a full nuptial mass within the church, or a blessing of the marriage bed. The consistent holdover from Roman law seems to have been the action that was still most associated with betrothal — namely, the consent to the relationship given by the groom and the agent who gave the bride.

Sacramentaries of the early medieval period resonate with a mishmash of the ideas of Augustine, the sensual sensibilities of Teutonic spirituality, and biblically based understandings of marriage. Marriage is given by God not just for the purpose of procreation but also for the exercise of fidelity, love, and mutual support. Throughout the next centuries in various parts of the Holy Roman Empire, different emphases in this amalgam of marriage paradigms take precedence, sometime highlighting the mutuality of the relationship, often hearkening back to earlier Roman sensibilities according to which it is the bride who is given and whose status is changed. Nowhere is this return to Roman perspectives more clearly expressed than in the Gregorian Sacramentary’s insertion into the marriage rite of the Ephesians’ analogy of the relationship between groom and bride as parallel to the relationship between Christ and his church.

In the High Middle Ages, a time when making the right marriage became critical, when much of medieval life and culture were built around feudal codes, and when veneration of the Virgin Mary was becoming a core element of medieval piety, a new concept of chivalric romance began to be constructed. While the lives of most everyday men and women could not be compared in any way with the heroic stories of chivalric romance being produced at this time, a changed appreciation for the relationship between men and women seems to have entered into western psychology.

Within the literate nobility, romance became a central theme in relationships between the sexes, and, as a result, a counter image to Eve the temptress was created, undoing much of the vilification of women that had entered life through western philosophy and asceticism. Unfortunately, what also resulted was a different kind of objectification of women as noble, chaste, fragile, pure beings; and this romanticized view of the relationship between men and women in centuries to come helped shape the development of romantic expectations for all marriages and all sexual unions.

By the late medieval period, we see a deepening divide between all things sacred and profane, as well as a fully developed societal and legal authority invested in the officers of the Church. The continuing importance of the betrothal, with its emphasis upon consent and commitment, led to the necessity to make this consent an action done as a part of the marriage rite in the presence of the priest. This led to a diminishment of the role and efficacy of the whole communal betrothal process. While periods of betrothal, engagement, and

courting clearly continued in society, cultural, social, and anthropological processes that had previously served as the building blocks of Christian society gave way in importance to brief formalized events now presided over by the priest and disconnected from the events of secular life.

The important part of a marriage rite — a rite that was becoming available to more individuals as the middle class began to burgeon in late medieval society — was now the consent given by the couples, and blessing given by the priest at the doors of the church, or followed by a full nuptial mass in the church with the nuptial blessing saved for the end of the mass.

As the scholastic church of the late medieval period was narrowing its understanding of how Christians were to understand sacrament, marriage (along with its counterpart, ordination) came to be seen as one of the seven sacraments of the Church. Both the man and the woman were now seen as entering into a sacramental act, and now both the man and woman were expected to voice their consent. Vows were exchanged — vows that in most circumstances (but not all) required the woman to swear her obedience to her husband. A life-transforming process that had formerly been left in the hands of families and communities who sought God's blessing on it was now authoritatively placed in the hands of the official, priest-led church, with clearly structured expectations and obligations prescribed and demanded by the Church and the assurance of clear, spiritual benefit to be derived from formal marriage with its sacramental nuptial blessing.

What can we learn with regard to marriage from this late medieval period of history in the Church? In this period, we see that in the process of further sacralizing the nature of Christian marriage in a culture that was growing less enamored with celibate life as the ideal, there was also an unintentional desacralizing of the deeply human elements of marriage. Entering into marriage came to be associated with participating in a particular religious ceremony presided over by a priest, rather than participating in a communal multistage process presided over by the couple and their families and blessed by God in the midst of celebration and feasting.

The question of who is worthy of marriage and entitled to the sacraments of the Church has continued to be an issue even until our present day. The strict focus that developed around the actions of an official in validating and legitimizing marriage, as opposed to the witness of a whole community, further intensified the needs of the disenfranchised to gain this right and privilege for themselves. The nature of human sexuality and its inherent goodness in human life once again found expression in parts of the Church and society in this era, with evolving views of manhood and womanhood helping to shape future iterations of life in marriage.

It is difficult to overstress the critical role that property acquisition played in changing mores around marriage. In an earlier day when few held property or wealth of their own, communal understanding and consensus could form the framework of family life. In Roman times, the family included anyone under the authority of the *pater familias*. In the early medieval period, local chieftains decided and defined the nature of family, claiming for themselves significant numbers of the women and children of a village in their family and leaving others to define their place at the margins of society.

In the late medieval period, as more and more individuals gained their personal and economic freedom and became the holders of land and property, the need for formal marriage and legal marriage was accentuated. Questions regarding who was married, how public their marriage was, the legitimacy of offspring, and rights to inheritance became paramount. It was this new landed and propertied world that created a pervasive demand for unambiguous legal marriage that was previously unprecedented in the West. In the late medieval period, for perhaps the first time in the history of the West, a sizeable percentage of Christians had the opportunity and the necessity to pursue officially recognized lifelong marital partnerships.

#### 4. The Reformation and Marriage

The primary changes to the understanding of marriage that arose from the Reformation were theological rather than practical. The rejection of the primacy of the celibate life was a core tenet of Reformation thinking, and with that rejection came a new emphasis upon marriage. Marriage was seen as the natural and original means of ordering human life. Established by God in creation, marriage was expected of all Christian people. In an adaptation of Augustine's teachings on marriage, Luther identified the three goals of marriage as procreation, a remedy for concupiscence, and companionship. However, this marital companionship no longer grew out of a sacramental understanding of marriage. Indeed, for Luther there were only two sacraments — Baptism and Eucharist.

Martin Bucer was the lone reformer who asserted that companionship was the primary purpose of Christian marriage. This companionship articulated by the reformers was based on a patriarchal model of life in keeping with ancient understandings of woman as the helper to man. Because marriage was no longer seen as a sacrament and Christ seems to allow for the possibility of divorce in the Gospels, divorce took on a prominent place in the Protestant history of marriage. Cranmer's 1549 rite of marriage names the service "Solemnization of Matrimony," indicating both its solemn importance to society and that it was not to be understood in that time as a sacrament. Rings were still exchanged, but were no longer blessed. The vows — the contract elements of marriage — were said in the nave of the church, and the blessing prayers for the couple were said at the altar, with the possibility of communion.

Protestant reformers saw the family as the central building block of the Christian life. They saw the act of marrying as a solemn act and a solemn obligation. They used marriage ceremonies as occasions to teach the entire community the Church's expectations regarding life lived in marriage — expectations that made procreation and childrearing the vocational center for all women, and which called all women to take vows of obedience to their husbands.

In contrast to some earlier periods of history, marital fidelity was an expressed expectation of both members of the marriage and not just of the woman. Familial and communal feasts and celebrations that had historically accompanied and been a part of marriage were severely criticized in some reform communities. If the medieval period had strongly urged that marriages take place in churches and be presided over by priests, most reformers absolutely required church marriages with pastors and witnesses present. While the theological principle of the priesthood of all believers was being espoused by reformers, they were simultaneously unwilling to allow the authority of local believers to govern the establishment of daily life, seeing church officials as the necessary religious and legal agents of society in the establishment of marriages.

At roughly the same time, the Council of Trent (1545-1563) was reaffirming that for Roman Catholics, marriage was a divinely given sacrament and therefore indissoluble. A new, formal definition of marriage appeared which required that all marriages be publicly announced with banns and vows before a priest and two witnesses. Most of the cultural activities associated with marriage continued: the celebrations, the dancing, and the feasting. But the Church had now made it clear that these activities, while encouraged by the Council for cultural reasons, did not validate a marriage. Only the church could validate a marriage. At this point it even became possible to validate marriages retroactively by gathering all children born prior to the marriage under the marriage canopy to legitimize them when a couple chose to receive the full sacrament of marriage.

In 1653, during the Puritan period of the English Commonwealth, the nature of marriage was once again reshaped by theological constraints. In this radical, Puritan setting, marriage became a simple vow between a man and a woman using a prescribed Puritan form from the Westminster Directory. The vow was made before a justice of the peace, and there were no prayers and no ordained minister involved, making it absolutely clear that marriage was not to be understood as a sacramental act, thereby allowing considerably

more latitude in arguing for the potential dissolubility of a marriage. Puritans saw marriage as an event with significant spiritual and religious implications. And yet, this form of marriage ceremony, carried out in a manner that was totally divorced from church life, opened the way in later historical periods for a returned view of marriage as a legal, social, and cultural event rather than a religious one.

This period of history tells us that Christian marriage, even when understood as both a legal and a religious act, has not held the same meaning for all Christians across the Church, nor has there been any form of consensus regarding the dissolubility of marriage. The divide between Catholic and Protestant understandings of marriage continued in the Reformation era to shape the Christian churches and especially Anglican dialogues about marriage. This was especially true within the New World, as The Episcopal Church continued to hold Old World sensibilities regarding marriage in creative balance with Protestant and Enlightenment worldviews.

Perhaps the only consistent elements within early modern Christian marriage practices were that marriages created legal contracts that protected the property rights of those with material goods; and that family and culture played a central role in how marriages were recognized and celebrated, even when the Church offered little opportunity for ritual celebrations to occur. The church and the state could control what took place in official settings; what happened outside those settings was less readily controllable.

### **5. Marriage in the New World**

American understandings of marriage were diverse from the founding of the United States. Puritan values regarding marriage as a central building block of society were continued among white Protestant Americans; and the sacramental, unbreakable bonds of marriage continued to be upheld by Roman Catholic Christians of the New World.

A core stricture that entered into Roman Catholic Spanish marriage practices and then quickly became a part of Latin-American marriage practices was the principle of “equality” — not equality as a source of mutual companionship between the genders, but social, racial, and economic equality between the two parties marrying. While those who were black or of mixed race were initially exempted from this law, the *Real Pragmática* made it illegal for *españoles* (white individuals) to marry across social or economic boundaries, thereby assuring protection of property rights within the white landed aristocracy and preventing the possibility of intentional mixed marriages.

In addition, this act was unprecedented in Catholic practice in requiring parental permission for any marriage to take place, taking the power of choice away from the groom as well as the bride. Once the marriage had been attained, the understanding within society and within the Church was that the patriarchal role of head of household required obedience of the woman in her relationship with her husband and afforded him the privilege of “correction” of her through corporal and other forms of punishment. While fidelity was a stated goal of marriage, as it had been in previous eras, the deep concern with fidelity was still placed upon the wife, while husbands were forgiven for straying. Particularly in aristocratic families, honor and female sexual purity took on an important role in Christian marriage practices of the New World.

In colonial Latin America, in response to the pervasive ethnic, cultural, legal, and economic oppression that restricted the day-to-day existences of the vast majority, marriage was often viewed as an unavailable or an undesirable option for couples seeking to spend their lives together — it was often viewed with skepticism and cynicism regarding its value and its purposes. The Church played such a controlling role in marriage that many sought freedom of relationship outside the bonds of the Church.

As a result, illegitimate children were a pervasive reality of early modern Hispanic life, despite the real constraints and limits that illegitimacy placed upon the inheritance rights of these children. However, illegitimacy was understood as considerably more deleterious to the lives of the elite than it was to the lives

of slaves, mixed-race individuals, natives, and others whose rights to freedom, property, and autonomy had always been, at best, fragile.

Seventeenth-century confessional manuals that were used by priests of the New World define marriage as contractual in nature, with expectations that husbands would support their wives, and wives would be obedient to their husbands unless the husband's demands were deemed unreasonable, irrational, and unjust by civil authorities. Beginning in the 17th century, we also see pastoral language of equality and reciprocity that imagines marriage in the ideal as a mystical union. This ideal was rarely experienced in real life by women who married.

It is not until the 1928 Book of Common Prayer, with its Anglo-Catholic influences, that this language of mystical union enters into the Anglican rites of the Church. These evolving understandings of marriage, with the tension between the civil and the religious aspects of marriage and the tension between marriage as contract and marriage as spiritual union, continued to hold sway over the next several centuries in the development of our understanding of the nature of Christian marriage.

Methodist influences on marriage rites highlighted the high level of respect due to the institution of marriage. In the 1784 *Sunday Service of the Methodists in North America*, John Wesley removed the giving-away of the bride from the ceremony, and, as was most often already the case in practice, also removed the option of communion at the ceremony. The giving-away ceremony came and went from Methodist and Episcopal rites over the course of the next hundred years.

Those who were brought to the United States and the Caribbean as slaves were not eligible for any form of legal or Christian marriage, although particularly pious slaveholders did on occasion create for their slaves domestic rites with some semblance to Christian marriage — rites over which the slaveholder presided and which held no legal sway. Instead, slaves were the property of their owners and were subject to even greater vulnerabilities in their sexual and parenting relationships than had earlier been the lot of slaves in ancient and medieval societies. The Reformation valuation of marriage as a God-given duty, privilege, and responsibility did not hold for those members of society who were identified by their owners and oppressors as subhuman and incapable of consent.

Despite the lack of legal or societal support for their marriages, black slaves in the Americas developed their own rites of marriage and established their own highly valued networks of family and kinship. Slave marriages held no legal authority, and those who had united themselves to each other in such relationships often experienced the severing of those relationships through slave sales. For the purpose of producing more slaves, at times slaves were “married” to one another by their masters, against their will and in direct violation of any already existing, unofficial, self-chosen “slave marriage.” Following the emancipation of the American slaves, all black Americans were allowed to marry, as long as they married a member of their own race. Biracial marriage continued to be illegal in parts of the United States into the second half of the 20th century.

Across the Americas, Native Americans were denied legal marriage rights. Miscegenation laws making it illegal for a person of another race to marry a Native American abounded, and often Native Americans were treated similarly to slaves, subject to the whims and desires of their overlords. Coming out of cultures with a variety of different understandings of what constituted both family and marriage, Native Americans continued throughout the 17th, 18th, and 19th centuries to develop their own network of kin, even while the religious and political authorities around them sought to coerce them into relationship definitions alien to their own cultural identity and values systems.

Asian Americans entering the Americas in the eighteenth and nineteenth centuries found a world largely hostile to their own values of family and kin. Immigration quotas allowed for the immigration of very few

families, with almost no Asian women being allowed to immigrate. As a result, men built same-sex communities for support and protection. Often these immigrants left behind spouses in their Asian homelands and endured long absences from spouse and kin, so that they could offer financial support to extended networks still in Asia. In the early 20th century, single men who had immigrated from Japan and Korea, and who were not legally allowed to marry white women, sought “picture brides” from their homelands. These picture-bride marriages were performed by proxy in Asia, afterward allowing these Asian wives who had often never even met their new husbands to immigrate to the Americas as immigration restrictions were relaxed somewhat.

Indian and Filipino men living in the western United States often married Latino women, creating families of blended ethnicity. In some Asian cultures, arranged marriages continued to be the norm. Chinese cultures, with their deep Confucian valuation of family, kin, and ancestors, began to thrive when doors were open for the migration of whole families. One significant commonality among most Asian-American and Latino families of this era was the primary role of the husband to serve as breadwinner, and the role of the wife to respond in support and obedience to her husband.

This portion of history helps illuminate for the Church the numerous ways in which marriage law was used to oppress, and the numerous ways in which subjugated people continued to find means to establish intimate bonds of familial relationship, despite the impediments to volitional marriage. In communities of deep suffering, these self-chosen bonds played a critical role in helping to sustain the spirits and the life energies of those living in the midst of oppression and subjugation. Once again, we see the ways in which relationality, kin networks, and culture trump any legal or political restrictions imposed upon the deeply human relationship of marriage.

Episcopalians who have remained in their homelands and not confronted the particular challenges to marriage definition and practice that have been such a critical part of the immigrant experience have continued to fashion cultural and ritual practices of marriage in accord with the deep traditions of their communities, while at times finding themselves addressing the encroaching westernization of marriage practices that has influenced marriage traditions across the world. Aligning local cultural and social sensibilities with the language and symbolism of a very western marriage rite, as found in the 1979 Book of Common Prayer, has offered its own particular challenges for these Indigenous communities.

## **6. The Victorian Concept of Marriage**

In the 17th century, the 1662 Book of Common Prayer asserted that the purposes of marriage were procreation, a remedy against sin and fornication, and mutual society (help and comfort), indicating little change in understanding since the Reformation period. But with the Victorian era (1837-1901), new patterns of practice regarding marriage began to appear in British and American society. As a result of industrialization and changed upper-class familial practices, a greater separation between home and work developed. Working-class women postponed marriage as they spent their early adulthood in paid factory labor. Lower-class rural families married early and produced children to help provide the family the labor force needed for a subsistence life.

Expanding economic prosperity allowed couples to marry earlier if they had the financial means to do so, and greater maternal health led to increases in birth rates. The expanding use of birth control among women in their later childbearing years allowed working women to return to the work force or to revenue-producing activities, and prevented dependent children from further taxing the resources of the family as older sons and daughters were able to leave and begin their own lives.

In the Victorian era, the home-workplace split led to a reconfiguration of familial identity that made the husband in the household the sole breadwinner and defined the many and necessary tasks of the wife as homemaking. Prosperous families prided themselves on their ability to function with one breadwinner, and

children in this setting came to be seen less as essential contributors to the economy of the family and more as precious innocents who needed to be nurtured and formed in the faith by their ever-present mothers. Married women continued to perform significant tasks in support of the financial and personal well-being of the family, but their work was no longer seen as part of an economic partnership with their spouses, as it had been in a more agriculturally focused era.

Societal expectations, particularly for middle- and upper-class married women, were that wives were loving, genteel nurturers, caring for young children and providing spiritual and emotional support to the entire family, while husbands, as heads of the household, provided economic leadership and the public face of the family. Some families that could afford to redefine the boundaries of family life functioned as nuclear families with a husband, wife, and children living together in separate homes from their kin, unraveling long-standing traditions of extended family and multigenerational households and thereby developing the model of the modern family.

By the late Victorian era, with its neo-Gothic influences in society and religion, many of the romantic notions born in the age of chivalry were finding their way into popular culture and helping to shape a growingly romantic image of women as fragile flowers, men as their champions, and marriage as an idealized activity laced with passion and gallantry. The marriage of Queen Victoria to Prince Albert in 1840 provided Anglicans across the globe with a new romantic model for the ideal marriage ceremony. An elaborate ritual, a long white dress, a horse-drawn carriage, and sacred vows said before a priest came to be seen as the desirable way in which to marry.

In Anglo-Catholic segments of the Church, the term “sacrament” was again being used to explain the nature of the rite. The diversity of understandings regarding who was acting in marriage, under whose authority they were acting, and what role the Church was playing in this rite was significant. Many, of course, did not have the resources to allow for such elaborate celebrations of their marriages and made do with the legal requirements imposed by the state, coupled with whatever familial and cultural festivities were possible.

By the end of the Victorian era, we also see changes in the relationship between men and women impacting understandings of marital roles. These new paradigms for women and men neatly sliced up human life between the public and economic world of men and the private spiritual and domestic world of women. This public-private split had the effect of confining women’s activity to a degree that was in some ways unprecedented. Women who in the past had found their identities through participation in familial businesses and farms, through celibate lifestyles, and through economic partnerships (albeit unequal partnerships) with their husbands were now confined to the roles of mothering and homemaking. In working-class families where such clearly delineated roles were most often not possible, families were left with a sense of failure and shame.

The response to that narrowing of roles that arose by the late 19th century was a new call for rights and freedoms for women, including the right to vote. Women began to organize on behalf of themselves, the poor, exploited laborers, and children. The tension between women’s public selves in these arenas and in their private domestic roles would in the next century lead to dramatic changes in the nature of marriage and family life, including Christian marriage.

## **7. Twentieth-Century Episcopal Marriage**

Women’s suffrage became law in the United States in 1920, signaling the radical changes in women’s roles and the nature of Christian marriage that were already afoot. The 1920s were an era of sexual and economic liberation for women, with many women rejecting the traditional boundaries of marriage that called for obedience to husbands and instead promoting sexual and marital relationships that were peer-based. In response to social and theological changes taking place in the Church, the Form of Solemnization of Matrimony in the 1928 Book of Common Prayer removed the vow for the wife to obey her husband.



Otherwise, the rite looked surprisingly similar to Cranmer's first marriage rite, despite the nearly 400 years of history and radical changes in marital, familial, and social customs and mores that had transpired.

U.S. marriages were to take place only within the confines of state law. An exhortation regarding the nature of marriage was still read. Vows were still exchanged. Rings could be given, and blessing prayers were still said by a priest. By the mid-20th century, all Christian persons were fit candidates for Christian marriage so long as there were no legal impediments that would prevent the marriage; however, miscegenation laws continued to make it illegal for persons to marry one another across racial lines. What was also changing was the prioritization of the reasons for marriage. The vision of companionship that Bucer had already promoted in the 16th century was now coming to play a central role in the understanding of the nature of marriage, but now more as companionship among equals rather than according to the hierarchical model of relationship expressed by the medieval and reform churches.

In response to changing cultural patterns, the 1967 General Convention of The Episcopal Church called for a study of issues closely related to sexuality, including contraception, abortion, divorce and remarriage, and homosexuality. Slow in materializing, the first clear response to that call was seen in a 1976 General Convention resolution stating that "homosexual persons are children of God who have a full and equal claim with all other persons upon the love, acceptance, and pastoral concern and care of the Church."

The second half of the 20th century brought the fruits of the Liturgical Renewal Movement to all the rites of the Church, including the "Celebration and Blessing of a Marriage" — language that would not have been used for such a rite since the Reformation. The new introduction to marriage in the 1979 Book of Common Prayer lists as the first intention of marriage the couple's mutual joy. This is followed by reference to the help and comfort given one another in prosperity and adversity (language, we have seen, that has been a part of the Church's understanding of marriage for hundreds of years).

Last in the priority is the procreation of children. After centuries of traditional ritual language that only in small degrees reflected the enormous, although gradual, changes taking place in the nature of Christian marriage, here was a rite for a new generation of Christians. Or was it? Quickly following its promulgation, there arose voices in the Church that questioned the wisdom of including the reference to Ephesians 5 in the introduction to the marriage rite and the inclusion of the Ephesians 5 reading in the list of options for the epistle in the service. Questions also arose about the advisedness of offering an option for the giving away or presentation of the bride. What did these rites say about the nature of Christian marriage and how Christian marriage related to understandings of largely egalitarian romantic marriage in the broader society?

Modern liturgical reformers have had fewer difficulties letting go of earlier reform sensibilities about the nature of the marriage rite. They describe marriage as a solemn and public covenant between a man and a woman — language that would have been in keeping with Protestant sensibilities regarding marriage. Requirements for this service are that at least one person be baptized, that there be at least two witnesses, and that the marriage conform to the laws of the state and the canons of the Church.

But there are also significant changes from the Cranmerian rites of the 16th century. Twentieth-century liturgical reformers added a clear blessing of the rings given in marriage, a pronouncement by the priest that the couple is husband and wife, and a specific prayer that is identified as the nuptial blessing and only to be performed by a priest or a bishop. Taken as a whole, this rite says more about the changes that have taken place in The Episcopal Church's understanding of itself and the role of priests (of who can bless and under what circumstances) than it does about its understanding of the nature of Christian marriage since the Reformation era.

In response to dramatic social and cultural changes, the 1991 General Convention further addressed the issue of human sexual relations by adopting a resolution designed to shore up established views of human

sexuality and marriage. That resolution stated that “the teaching of The Episcopal Church is that physical sexual expression is appropriate only within the lifelong monogamous union of husband and wife.” The resolution also recognized “the discontinuity between this teaching and the experience of many members” of The Episcopal Church.

By examining 20th-century issues related to marriage, we see that questions that have been a part of the pattern of the development of marriage continue to arise in the modern era. The Church affirms the significance of mutual joy as a central purpose of marriage, even as it expands its own definition of mutuality. The Church continues to ponder the question of divorce. It continues to struggle with the question of who may marry whom, and with the relationship between legal marriage and spiritual marriage. It continues to converse with the voices of culture and society that are so central to any people’s understanding of what marriage is. These same questions help shape our work in present-day discussions of marriage.

### **8. Twenty-First-Century Christian Marriage**

Industrialized society has continued to change at breakneck speed over the 35 years since the ratification of the 1979 Book of Common Prayer. Women have been recognized as full partners in the workforce, even if they are not yet paid accordingly. Men and women expect to share the responsibility of childrearing. As the life expectancy of married persons has risen significantly, divorce rates have skyrocketed since the Victorian era to a new plateau, where, for the last 30-plus years, almost half of all marriages are expected to end in divorce. Sexual relationships before marriage are largely seen as normative, and sexual relations in general are understood to be a true gift and pleasure of human life. Cultural norms have changed so that increasingly greater numbers of people decide to cohabit before marriage, including older persons who, for financial reasons, are not economically able to make a decision to marry.

Birth control is readily accessible, and growing numbers of individuals choose to have children outside of marriage. Technological medical resources help couples to conceive outside the boundaries of heterosexual conjugal sexual relations, and those same technologies help bring to term the children that are produced, sometimes resulting in ambiguous answers to the question of who are the child’s real parents. Only a minority of cultural settings in The Episcopal Church support the notion of marriage as anything besides a partnership between equals. Those who reject marriage often do so because they fear that current cultural mores around marriage have not progressed far enough, and that the institution of marriage can be stifling and restricting, potentially depriving one or both members of the marriage of full opportunities to participate in contemporary society.

Another radical change in the nature of our understanding of marriage has come in the last several decades as gay, lesbian, bisexual, and transgender people have taken on greater visibility in our society and have worked to gain a voice, a presence, and legal rights within both the broader culture and the Church. The question of same-sex union has inevitably led The Episcopal Church into a discussion of whether culturally, legally, morally, and spiritually same-sex marriage fits our current definitions of Christian marriage. As states across the United States and nations around the world move to legalize same-sex marriage and to allow for adoption of children by same-sex couples, the imperative to develop a theologically sound and culturally sensitive response to the question of the sanctity of a same-sex marriage has heightened.

In response to a directive from the 2009 General Convention of The Episcopal Church, the Standing Commission on Liturgy and Music (SCLM) developed and collected theological and liturgical resources addressing the issue of love and commitment in same-sex partnerships. It is in large part as a result of the conversations begun in that setting that the current Task Force on the Study of Marriage has been asked to develop resources that will help the Church more fully explore the historical, theological, practical, and canonical issues surrounding Christian marriage.

Harkening back to earlier chapters in the Church's history, the SCLM framed core Christian values identified within our marriage traditions and expressed those in language fitting to our contemporary context. The "'I Will Bless You, and You Will Be a Blessing'" document provided the following expectations for all persons desirous of living in a Christian marriage: that relationships "be characterized by fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God." It is our hope that this brief historical overview of marriage will offer members of the Church a roadmap that allows us all to see the historical continuity between this definition and the unique elements of this definition that have come to our understanding of Christian marriage over the course of the last hundred years.

Words are not static representations of some concretized unmoving reality. They are fluid, symbolic vehicles for naming that which we know to be true in our own time, our own day. "Marriage," "mutuality," "faithfulness," "companionship," "love": when understood within the context of history, these words have meant different things in different times. How we define marriage in our own day can be guided and informed by the many definitions we have encountered in history. But like all aspects of our faith life, the call from God ultimately is to come to experience and understand the Christian life in our time, our places, and our widely divergent historical, spiritual, psychological, and sociological contexts. That work is left to the Church. All that we of the Task Force on the Study of Marriage can even hope to do is to shine a light on the many meanings and purposes of marriage that have been part and parcel of the Christian life and faith.

### **Discussion Questions Related to the History of Marriage**

1. Reading through the entire history of marriage, draw a diagram that compares and contrasts the concepts of marriage that are held by the wealthy and powerful as compared to those held by the landless, propertyless, and powerless in a society. Is it possible that marriage means different things to people, even within the same historical and cultural time frame?
2. Much of history tells us that marriage is a process, not an event. One of the central features of almost all marriage practices is the presence of betrothal rites. In earlier periods of history, betrothals lasted longer and were more formalized. Many of the elements that have been subsumed into our contemporary marriage rite began as parts of Jewish, Roman, or medieval rites of betrothal. What benefit does betrothal offer a couple and the communities in which the couple participates? How might contemporary betrothal practices be augmented to further support the process of marriage?
3. Who writes laws that prohibit individuals from marrying each other, and, from a historical perspective, what have been the primary motivations for these laws?
4. Since the beginning of time, men and women have entered into sexual and domestic relationships for the betterment of their own lives and their societies. Sometimes those unions have been defined by a shared communal ethic. At other times definitions have been primarily legal. Occasionally marriages have been described as primarily spiritual unions. Are all legal marriages spiritual unions? Is legal marriage required to validate a spiritual union? How central to a marriage is the public nature of it — whether it is witnessed to and affirmed by extended family networks and social relationships?
5. When you look with a long lens at the history of marriage, has it evolved or simply changed? Are contemporary Episcopal understandings of marriage, and particularly of the necessity and significance of mutuality in marriage, more evolved understandings of the human condition than what was understood at earlier points in history?
6. How, if at all, does this discussion of the history of marriage inform your own views regarding the wisdom of the church allowing same-sex marriage?

7. If almost 50 percent of marriages are currently ending in divorce, is that good or bad? What might the 21st-century Episcopal Church do to make Christian marriage a more viable and robust institution in the coming decades?

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## ESSAY 4: Marriage as a Rite of Passage

The catechism of the 1979 Book of Common Prayer describes the rite of marriage as a sacramental rite which “evolved in the Church under the guidance of the Holy Spirit.” It goes on to say that “[a]lthough they are means of grace, they are not necessary for all persons in the same way that Baptism and Eucharist are” (860). This is, in part, why we describe marriages as sacramental rites rather than as sacraments.

While marriage may provide deep and rich spiritual blessings to the lives of those who are called to this state, not all marry, nor do we believe God ever intended for all to marry. From our Christian perspective, we understand the marriage covenant, like the covenant to a life of celibacy, to have a special, graced place in our lives. We pray that the Holy Spirit is at work in our daily lives through our ongoing participation in the life that proceeds out of the sacramental rite of marriage. We hold this rite in high esteem, and as Christian people we work diligently to uphold both the dignity and the integrity of the rite and of the graced life to which it calls us.

The rite of marriage carries with it a special weight and has at times been described as the one liturgical rite in the lives of laypersons where they may be invited to have a central role in its planning and administration. No one who understands our Christian theology regarding God’s sacramental presence in the world would dare diminish its significance to the life of those Christians who have been called to this sacred vocation.

There is, however, an overarching, almost universal phenomenon that applies not only to Christians entering into marriage, but to all persons of all religions who choose to engage in their cultures’ marriage rites. What are these rites about? What do they do? How important are they to their participants, and are they purely for the sake of the two people being joined to one another?

### 1. Marriage as a Rite of Passage

Marriage rites are omnipresent in human societies across history, cultures, and geography. How marriages take place, what their purposes are, how they are interpreted, and who officiates varies across time and space. In the early 20th century, a French anthropologist, Arnold van Gennep, began to look at rituals from a scientific perspective to try to ascertain their purposes beyond those already articulated from a religious perspective. The work he first produced has helped inform our understandings of human rituals throughout the modern era.

Van Gennep came to identify a certain type of ritual activity as “rites of passage.” By this he meant that these formal ritual actions were used to help individuals or communities transition from one life state to a new one. They provided a ritual passage that enabled the members of a society to navigate the complicated and often perplexing waters from pregnancy to parenting, from uninitiated to initiated, from childhood to adolescence, from adolescence to full adulthood, from singlehood to married life, from follower to leader, and from life to death. Marriage fits within this category that he labels rites of passage — along with initiation rites (including Baptism and Confirmation), ordinations, *quinceañeras*, monastic rites of profession, adoption rites, marriage-anniversary celebrations, burial rites, and a host of other, less-formalized rites practiced in our journey from birth to death.

There are, of course, other forms of ritual that serve other purposes; that help remedy sin or a rupture in the relationship with the divine; that call upon the divine for assistance, that return people to health and wholeness; and that create a pathway for communion with the divine. Van Gennep asserted that, somewhat differently from these other forms of ritual, rites of passage served core sociological, cultural, psychological, and political purposes within a society. They help to keep society intact. They serve the needs of not only the individual but, just as important, they serve the greater good by making ways forward that mediate against

chaos, confusion, and anomie within particular communities during specific moments of transition and change.

## **2. Liminality in Rites of Passage**

As van Gennep examined rites of passage across cultures, he began to notice a generalized pattern to those rites. He identified a pattern that began with an event of separation from one's old identity, followed by a transition time that allowed for changes in role and status, followed by an event of reincorporation into the community with one's new identity and status.

Victor Turner built on the work of van Gennep. He further fleshed out his own sense of what was happening during a rite of passage, and how that rite reshaped the community in which it took place. Turner paid particular attention to the period of transition leading up to the rite that finalized the change in status of the person or the community. What he witnessed in his anthropological research was a kind of liminality that was particularly at work in this transition time. Individuals during this period were "betwixt and between," neither fish nor fowl. This period of liminality often both allowed for and required a kind of suspension of former rules and categories in relation to the person in transition. Because of this, there was a sense of graced time which created an experience which Turner described as "communitas."

Communitas is about more than just everyday communal relationships. It is a shared ethos and experiential context that allows for greater freedom, greater intimacy, and higher levels of care and bonding than might normally be part of the fabric of everyday life in society. During periods of communitas, trust is built. Relationships are forged, and bonds of affection are created. This period of communitas, this liminal period in the life of an individual, creates a kind of elasticity of identity that encourages and allows for greater adaptivity, creativity, and spontaneity.

If people are to reinvent themselves, there must be room to allow for trial and error and evolution. One does not come to sport a new identity overnight — not successfully. As the community makes room for this kind of liminality, these forays into communitas provide a rich and full societal environment for intimacy, creativity, and adaptive change. The whole of society benefits from its participation in individuals' rites of passage that are taking place.

Turner's studies of this period of liminality led him to believe that its significance to the change of status process was so central that he renamed van Gennep's three stages of rites of passage as the pre-liminal, the liminal, and the post-liminal stages. He also revised van Gennep's work (and the work of others who were exploring ritual) to assert that while at times rituals become the vehicles for societal stabilization and support of the status quo, at other times they become the means to overturn the status quo and create greater systemic change in the society. Sometimes what is called for is a loosening of power, an overturning of tradition, or an adaptive process of redefining the nature of life in community. All of these goals could be met, Turner believed, through ritual processes, particularly rites of passage rituals.

Turner's observations affirm that marriage rites can move individuals from one family constellation to a new one, can unite two previously unconnected families, can create avenues for dealing with important social and economic status changes within two families, can cement new political alliances and power dynamics among its participants, and can serve the greater good by promoting a culture of trust and relationship, even among those who might previously have been strangers to one another within the community.

As Christians we might posit that all of this is work the Holy Spirit might find immensely rewarding and might choose to participate in, whether the individuals taking part call themselves Christian or not. Anthropologists, of course, would have no need to affirm divine providence over this work and would assert that it is simply the natural, evolved cultural adaptation of a society to the need for growth, flexibility, and movement within human society.



### **3. Betrothal and Marriage**

For much of the history of marriage in many parts of the world, the process of marrying has been just that: a process. While this is still true in many parts of the world, it is less true in modern, westernized societies. Often the event of separation that has marked the movement out of the pre-liminal stage into the liminal stage has been some form of betrothal rite in which promises are made and preparations are begun that will, in time, lead to a final rite of marriage. Often there have been small rites along the way that are a significant part of this liminal period. Perhaps there is a feast to announce the betrothal. At times there has been an exchange of gifts or tokens as signs of the promises being entered into. Public acknowledgements of intent have been expected.

During the period of betrothal, there have often been opportunities for the two families represented in the marriage to communicate with one another and begin to build bonds. There might be discussions and even negotiations about material goods to be transferred from one family to the other as a result of the marriage. During this period, couples have often been allowed an opportunity to come to know each other better, and sometimes a new degree of intimacy between the two who are to marry is allowed or even encouraged.

Communities have seen a marriage as taking place through a series of rites that culminate in one final ritual action that moves the couple, their families, and the communities in which they are embedded into a new understanding of the identities of the married persons and new bonds of relationship within society. An entire network of relationships is altered through a marriage, and betrothal practices have allowed time for all those within that network to grasp and apprehend this new configuration of relationships.

The ritual studies scholar Ronald Grimes has written about the ways in which contemporary society has compromised the fabric of North American and other westernized rites of passage to a degree that is potentially detrimental. The movement out of singlehood into marriage requires comprehensive transformations for the individuals involved and the families of which they are a part. Virtually every aspect of one's life is changed through the act of marrying; economic, political, legal, emotional, psychological, social, and spiritual changes are expected of those who marry. In a different period in history, couples took months or even years to make those changes.

Now, in our contemporary society, marrying is seen as a single act on a given day at a prescribed time. That rite may occur either through a legal action completed by signing a license and appearing before a representative of the state or through a religious action that requires a legal component to be fully recognized as marriage. Whichever form a marriage takes, there is currently nothing in the process that requires a period of liminality greater than the state's prescribed requirements about how long before the wedding one must obtain the license or the religious community's expectations about how far in advance one must announce one's wedding and participate in the required premarital counseling (if any is required).

By asking individuals to believe that a marriage can take place through a ritual action that might be as brief as ten minutes with virtually no period of preparation, some ritual scholars believe we have truncated our ritual processes to such a degree that the rites may no longer be able to do what they are designed to and claim to do. A legal contract can be signed in a few brief moments. But individuals, societies, and the Church believe that marriage is meant to be far more than a simple legal contract.

### **4. Creating a Liminal Space in a Contemporary Context**

Those desiring to marry in The Episcopal Church have worked and continue to work with rubrical and canonical expectations that have to some degree been instituted to mediate against the danger of people marrying before any public preparatory liminal period has occurred. The publishing of banns originated at a time when some within society were engaging in secret marriages — marriages that were not public and did not represent usual patterns of public recognition by all in the society of the nature of the relationship. This situation left the secret spouse in an extremely vulnerable position. This private, secret marriage status

made it easier to “put away” a spouse who might prove a financial, political, or social liability. The publishing of banns militated against bigamy, against marriages by those who had taken vows of celibacy, and against marriages that would not be supported by the extended families or the legal and social communities that might, by the very definition of marriage, be expected to affirm and respect this relationship.

In the 20th century, in large part in response to changing patterns of marriage and divorce in contemporary North American society, the Church added a canonical requirement for premarital counseling prior to marriage in an Episcopal rite administered by an ordained Episcopal minister. This premarital counseling requirement set up and made use of a period of liminality in which the couple could explore the depth of change that marriage would bring to their individual and shared lives. Effective premarital counseling is meant to foster the development of “*communitas*.” It calls for attention not just to the ritual preparations for the rite of marriage, but also to preparations for all that it will mean to live in the hoped-for, lifelong state of holy matrimony.

When premarital counseling is abridged into a brief discussion of the ritual details of the wedding itself, it ceases to fulfill either its spiritual or societal purposes. While premarital counseling is not the only way to facilitate the forming of a marriage, it is at least an expression of the Church’s deep conviction that the intentional development of a relationship that can support the state of holy matrimony is both necessary and helpful to a Christian marriage.

One hears, at times, of premarital counseling paradigms that focus almost exclusively on helping the couple explore the spiritual aspects of their marriage. In this counseling there is often a great deal of attention given to the sacramental element of a marriage, the nature of marriage as a lifelong covenant, the theological meanings of marriage, and the couple’s decision to participate in some religious community as an ongoing part of their Christian marriage. While all of these are deeply worthwhile conversations, it is also important to remember the nonreligious aspects of life lived as a married couple. Economic stewardship, parenting, the roles and expectations of daily life, extended familial relationships, sexuality, and intimacy are all significant aspects to holy matrimony.

They all also have a secular parallel. Even when couples seeking to be married in the Church do not grasp the theological significance of these aspects of their marriage, their social, economic, and political significance continues to be paramount. Therefore, it behooves those preparing couples for marriage to attend actively to the larger picture of what marriage means for those who are deeply faithful Christian persons who will build their whole marriage on a spiritual frame — and for those for whom the spiritual component of marriage is viewed as simply one aspect among many.

One cultural shift we are witnessing in much of contemporary western society is a movement toward cohabitation as a stepping-stone to marriage. At a time when former models of marriage that created space for a liminal period have eroded, couples appear to be building their own liminal period betwixt and between singlehood and full entrance into a societally sanctioned lifelong partnership. Demographic evidence suggests that for those who choose lifelong partnerships, marriage is still most often the hoped-for status; however, cohabitation seems to be serving as a middle ground for those not yet able to take on the full weight of marriage expectations.

Seen from an anthropological point of view, we can view this move toward temporary cohabitation and “capstone marriages” as a potential correction to precisely the set of concerns raised by Ronald Grimes and others. Many seem to be viewing marriage as something that can and should be eased into rather than jumped into. Anthropological research affirms the wisdom of this basic intuition. Whether cohabitation is the best means possible for creating this liminal period is certainly a subject worthy of debate. But the need for a transition time between singlehood and marriage is readily evident. How this liminal time is optimally used

by the couple, the families, and the greater community (including the faith community) is another question worthy of further discussion.

### **5. Marriage as a Prophetic Act**

While the history of marriage document in the work of the Task Force highlights the ways in which legal marriage has often been a means to maintaining existing power structures and supporting the status quo, it is important for contemporary Christians also to heed Victor Turner's assertion that marriage can, at times, be a ritual that subverts the status quo and invites the larger society to reconsider its own assumptions about how the world should be.

In an age when political tensions are high among those of different Abrahamic faith traditions, contemporary societies are also seeing unprecedented levels of interfaith marriages between Christians, Muslims, and Jews. These marriages can become both the signs of and the means to stronger bonds of mutual love and support among these groups. At a time when racial tensions run high across much of our society, we are also witnessing unprecedented levels of interracial marriage. Each of these marriages invites the societies around it to explore visions and strategies for living that enable solidarity and mutual support rather than public strife and rupture.

Marriages can cross class lines, political affiliations, ethnicities, and a host of other societal and cultural divides that have become established between peoples. These marriages can serve as grassroots training grounds for learning a new way to be and live together — a way that celebrates love, openness, communication, partnership, mutuality, community, and shalom. Marriage rites among diverse couples can become occasions for celebrating all that unites us in our humanity rather than all that divides us in our differentness. They become important public attestations to a different way of being — a way of being that speaks to the core of the Gospel message but is not always witnessed to publicly in our larger society or even in our sometimes-segregated church communities.

When marrying couples have prepared themselves for marriage; have worked with families and friends to create new bonds of relationship; have already publicly lived into vows of mutual support and fidelity; have expressed to those around them the commitment they are making to a lifelong union that will not be undone by prosperity or adversity, then these couples have made their rituals into subversive acts — prophetic acts that challenge the values of the society around them and call that society to a richer, fuller, more robust way of living human life.

The language of Episcopal marriage rites promotes this fuller vision of humanity; however, words alone are not enough. It is vital that marriage vows be entered into with integrity, with awareness, and with a truthfulness that will not ultimately call the rite into question. Instead, the couple and the enacted rite will call into question the choices of a society that does not actively protect and support this vision. Effective intentional ritual action has this capacity. It can become a means to political, social, economic, and societal justice by allowing all those who participate in the words and gestures of that ritual to see the world as it can be. But this can only take place when the rite is perceived in its execution as being wholly guileless and completely truthful in its message and its intent.

One of the very important questions the Church faces in an age when almost 50 percent of marriages end in divorce is, how do we prepare couples to be ready to enter into just such deeply truthful and culturally challenging rites? How do we imbue our marriage rites with Christic integrity, so that the truths they can proclaim can be heard and received by those present for these rituals? Are betrothal periods — periods of marriage formation comparable to baptismal formation — necessary and essential for this to take place? And how do we undergird and support processes of marriage formation that truly prepare couples not just for wedding ceremonies, but for married life as well?

There are no easy answers to any of these questions, and assuredly the answers we come to will vary across our cultural landscapes. Exploring these questions seems important and life-giving work for our Episcopal religious community. If we perceive marriage rites as substantial, life-giving sacramental acts that have the potential to call us deeper into the heart of God, into spiritual renewal and greater life transformation, then it is incumbent upon us to turn our hearts and minds to these questions for our own sake, and for the sake of the world.

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## ESSAY 5: The Marriage Canon: History and Critique

### 1. Overview

Resolution 2012-A050 directs the called-for Task Force to explore the biblical, theological, historical, liturgical, and canonical dimensions of marriage; and to consult with the Standing Commission on Constitution and Canons and the Standing Commission on Liturgy and Music to address the pastoral need for priests to officiate at the civil marriage of a same-sex couple in states that authorize such. Additionally, Resolution 2012-D091, calling for specific amendments to Canon 1.18 intended to allow same-sex marriage, was referred to the Task Force for study. These issues cross biblical and theological dimensions that are explored more thoroughly elsewhere in this report. This section of the report surveys the history of the Episcopal canons addressing marriage and then explores current issues presented to this Church in Canon 1.18, including the current description of marriage as applying only to couples comprising one man and one woman.

### 2. History

Canonical history in The Episcopal Church is consistent in one respect: canons follow practice. That is, the Church changes and evolves its practice and then amends the canons to reflect the current practice.<sup>33</sup> Sometimes this happens relatively quickly — for example, in the case of the ordination of women; sometimes this happens slowly — for example, in the case of the Church’s practices regarding divorce and remarriage. In either case, a review of the journals of General Convention and of *The Annotated Constitution and Canons* (White & Dykman, eds., 1979) shows that oftentimes the discussion has taken place over a number of years before the amendment passes General Convention. The marriage canon has followed this norm.

It should be noted that the term “Holy Matrimony” may appear to be used interchangeably with marriage. Holy Matrimony is not defined but in usage refers to the sacramental rite of the Church, and some prefer its use in the context of the Church’s relationship to weddings and marriage. The connotation of “Holy Matrimony” is something more than marriage as defined by civil law. That “something more” is expressed in covenant language: the exchange of vows in the presence of a priest and at least two witnesses and blessed in the Name of God. Yet the marriage rite in the Book of Common Prayer 1979 is entitled, “The Celebration and Blessing of a Marriage.” And both civil and church law talks of “solemnizing” marriage. Even if Holy Matrimony is understood as “something more,” that understanding is more aspirational than real, as marriage in the Church is no guarantee of success of the relationship.

The canons addressing marriage or Holy Matrimony first addressed not the making of the marriage but its dissolution. The first mention of marriage in the canons<sup>34</sup> of The Episcopal Church appears in the Convention of 1808. The House of Deputies referred a communication to the House of Bishops, then consisting of the two bishops in attendance, White and Claggett, making a request. The communication asked the bishops to consider adopting the English canon regarding marriage and inserting it into future editions of the prayer book.

The bishops responded by deferring the matter to consideration and action by a future convention, pointing to the absence of some of their members, as well as absences among the deputies. The 1808 convention instead passed a joint resolution stating “the sense of this Church” regarding the remarriage of the divorced, declaring, “it is inconsistent with the law of God, and the Ministers of this Church, therefore, shall not unite

<sup>33</sup> There are other instances when amending the canons was intended to change the practice. A recent example is the serial revisions of Title IV between 1994 and 2009.

<sup>34</sup> The Constitution of The Episcopal Church has not historically addressed marriage. The discussion here is confined to the canons.

in matrimony any person who is divorced, unless it be on account of the other party having been guilty of adultery” (White & Dykman, 398).

This joint resolution of 1808 remained the only statement of the General Convention on the subject of marriage until 1868 when the first canon was enacted as Canon II.13:

No minister of this Church shall solemnize Matrimony in any case where there is a divorced wife or husband of either party still living; but this Canon shall not be held to apply to the innocent party in a divorce for the cause of adultery, or to parties once divorced seeking to be united again.

The new canon restated what the joint resolution of 1808 had put forward: remarriage of a divorced person is allowed only when the divorce occurs because of the adultery of one of the partners and then only of the innocent partner. It also adds a clarifying statement that allows a divorced couple to reunite and remarry in the church. This statement regarding divorce and remarriage relied on what is commonly called “the Matthean exception,” referring to Matthew 5:32: “But I say to you that anyone who divorces his wife, except on the ground of unchastity, causes her to commit adultery; and whoever marries a divorced woman commits adultery.” Allowing this exception to the general prohibition of remarriage of a divorced person while the other partner lived was an Episcopal Church step away from the Church of England’s blanket ban on remarriage of divorced persons (White & Dykman, 398-99).

The 1877 convention repealed Canon II.13 as it was enacted in 1868 and enacted a new version entitled “Of Marriage and Divorce”:

- Section 1 declared unlawful any marriage “otherwise than as God’s Word doth allow”;
- Section 2 prohibited ministers from knowingly solemnizing, after due inquiry, the marriage of any divorced person whose spouse is alive, if divorced for cause arising after marriage, and retains the exception for the innocent spouse or divorced spouses seeking to reunite;
- Section 3 prevented reception of a person not married according to the Word of God and the discipline of this Church into Baptism, Confirmation, or Holy Communion without the “godly judgment” of the bishop. But no minister could refuse the sacraments to a penitent person in imminent danger of death;
- Section 4 required referral of the facts of any case arising under section 2 to the bishop of the diocese or missionary jurisdiction in which the case arose, or, in the absence of such a bishop, to a bishop designated by the Standing Committee. The bishop was empowered to make inquiry into the matter as he found expedient and then deliver a judgment. No guidelines are given to serve as the basis for entering judgment;
- Section 5 applies the new canon only prospectively as to any penalties that may attach. (White & Dykman, 400-1)

The House of Bishops had concurred with the amendments in 1874 but the House of Deputies deferred consideration until the next convention in 1877. The 1868 amendments applied only to clergy, while the 1877 revision added penalties for laity by excluding from the sacraments those who married outside the Church.

Divorce rates remained low in the 1800s because secular law and social norms made divorce difficult. Spouses had to prove fault in some manner to obtain a divorce. Women, alone or with children, had few options for economic survival — a deterrent to seeking divorce. Divorce statistics were not even recorded prior to 1867. Less than 10 percent of marriages ended in divorce between 1867 and 1900. Nonetheless, the Church wrestled with how it should respond to its members who divorced. The idea of divorce ran counter to church values and ideas about marriage, but it played out in how the Church responded to its divorced members. The Church’s response came in the language of punishment: of clergy for knowingly officiating at the marriage a person who was divorced from a living spouse, and of laity who divorced and remarried.

The convention of 1883 appointed a joint committee of bishops and deputies “to consider the duty of the Church in relation to the whole subject of Marriage, including the impediments to the contract thereof, the manner of its solemnization, and the conditions of its dissolution, and to report to the next General Convention” (White & Dykman, 402). In their report to the 1886 convention, the committee contrasted the traditional view held by the Church with the prevailing secular sentiment seeking easier separation. The cause was identified as the ease with which first marriages were contracted, noting that children as young as 12 could marry without parental consent and without witnesses. The committee’s response was a proposed canon that featured:

- Setting 18 as the minimum age to marry without parental consent;
- Requiring solemnization to occur in the presence of at least two witnesses personally acquainted with both parties;
- Requiring clergy to keep a register of marriages recording certain facts, and signed by the parties, at least two witnesses, and the minister;
- Setting the law of the Church concerning divorce as that contained in Matthew 5:32 and 19:9, Mark 10:1, and Luke 16:18;
- Prohibiting divorce except for adultery or fornication, with the unfaithful spouse prohibited from marrying again during the lifetime of the innocent spouse;
- Subjecting clergy who violate the canon to ecclesiastical trial and admonition for a first offense and suspension or deposition for repeat offenses;
- Barring spouses from receiving Holy Communion for violating the canon except upon repentance and after separation from the new spouse.

The House of Deputies declined to concur in the adoption of the proposed canon which was referred to the next conventions of 1889, 1892, 1895, and 1901 with similar results. (White & Dykman, 402-3).

The convention of 1904 took up the proposal to revise the marriage canon and passed Canon 38, “Of Solemnization of Matrimony,” by a narrow majority after four days of debate in the House of Deputies meeting as a committee of the whole. Canon 38 set the following requirements:

- Section 1 required ministers to observe the law of the state governing the civil contract of marriage in the place where the marriage was performed.
- Section 2 required the presence of at least two witnesses to the solemnization and the recording in the proper register of the name, age, and residence of each party, signed by the parties, the minister, and at least two witnesses.
- Section 3 prohibited the minister, knowingly and after due inquiry, from officiating at the marriage any person who was divorced from a living spouse, except the innocent party to a divorce for adultery. It added the new requirements in the latter case of a one-year waiting period and presentation of the divorce decree and record with “satisfactory evidence touching on the facts of the case” to the ecclesiastical authority, along with evidence that the opposing spouse was personally served or appeared in court. The ecclesiastical authority, after taking legal advice on the evidence, declared in writing that in his judgment, the case of the applicant conformed to the requirements of the canon. It further allowed any minister as a matter of discretion to decline to solemnize any marriage.
- Section 4 authorized any minister to refuse the ordinances of Holy Baptism, Confirmation, or Holy Communion to anyone who has been married “otherwise than as the Word of God and discipline of this Church allow” until the case was presented to the ecclesiastical authority for his godly judgment. But no minister was to refuse the sacraments to a penitent person in danger of death.

As adopted, the canon represented a compromise — one that had eluded the General Convention for 15 years — between those who would prohibit remarriage of persons divorced from a still-living former spouse,

and those who advocated the limited adultery exception, previously enacted in 1868, for the so-called innocent spouse in a divorce for adultery (White & Dykman, 403-4).

Efforts to drop the adultery exception continued without success in the conventions of 1910 and 1913, when the question was referred to a joint committee on marriage. The committee's report to the 1916 convention argued for the exercise of discretion in excluding persons from the sacraments, recognizing that a subsequent marriage may have been entered into in good faith and in ignorance of the Church's law or while not subject to the Church's discipline, or may result in the break-up of a family. This discretion would lie with the minister of the congregation and the bishop of the diocese. The proposed canonical amendments failed in 1916 and 1919.

A number of changes in American social and economic structures from 1850 to 1920 kept the Church's discussions of the role of divorce and remarriage going. The Industrial Revolution drew men and women from rural community to the cities, from kinship community to a community of peers, and began to redefine the roles of men and women. Women organized to advocate for their civil rights in 1848 after the all-male Liberty Party added suffrage for women to its national platform. A month later, the Seneca Falls Convention met and adopted a "Declaration of Sentiments" demanding rights for women so that they could protect their homes and families.

Among the rights sought were equal treatment before the law; participation in the government of both State and Church; the right to own, inherit, and dispose of their property; and fair treatment in divorce. The Women's Christian Temperance Union (WCTU) organized in 1874, seeking to ban alcohol, and later tobacco and other drugs, in order to protect the home. Women protested their lack of civil rights and sought the rights that would treat them as adults in the eyes of the law, as opposed to the legal protections that kept them dependent on their fathers, husbands, and sons. Unable to vote, women — especially married women — lacked legal rights to retain custody of children and control of their own property in a divorce; legal protection against rape and other assaults, including domestic violence; and access to the economy to become self-supporting when they were widowed or divorced.

The institutions of that time were controlled by white men. Legislatures were all male. Women faced juries of men in civil and criminal cases. The Church reflected its times: only men could be ordained as clergy, and only men could serve on vestries and as deputies to General Convention. The WCTU obtained passage of Prohibition with the 18th Amendment to the federal constitution in 1920, subsequently repealed in 1933 in response to the uneven application of the law across economic class and in the face of widespread and open disregard for a law with a raft of unintended consequences. In short, Prohibition was unworkable. But women obtained the right to vote in 1920 with ratification of the 19th Amendment.

Women's roles in society continued to change with the Depression and World War II. Divorce rates increased in the early 20th century, doubling from 8 percent in 1900 to 16 percent in 1930. Divorce continued to be fault-based divorce codes, which required proof of abuse, adultery, or abandonment. Divorce rates dropped slightly during the Great Depression, in part because couples could not afford the economic consequences of divorce on top of unemployment. As the unemployment rate dropped, divorce rates began to rise gradually. By 1940, 20 percent of marriages ended in divorce. Fertility rates increased immediately following World War I, but then resumed a 50-year decline that was slowed only by the unreliability of available birth control (Coontz, 211).

The General Convention of 1922 amended section 3 of Canon 38, making it unlawful for any member of the Church to enter into a marriage when either of the parties was divorced from a living husband or wife. The convention of 1925 considered and rejected an amendment to section 3 of Canon 38 that restricted remarriage to cases where the bishop, acting with legal advice, found on the record that the divorce was granted for cause arising before marriage, essentially annulling the marriage, allowing remarriage of either



party. The House of Bishops considered a separate amendment that allowed remarriage of either party of any divorce, abolishing the Matthean exception. The proposal failed, and the Matthean exception survived.

The Joint Commission on Marriage and Divorce presented an extensive revision of the marriage canon that was adopted in 1931. Compared with the previous limited measures to regulate the solemnization of marriage by the Church, the new Canon 41, “Of the Solemnization of Holy Matrimony,” enacted far more detailed regulation of church marriage:

- Section 1 for the first time stated an affirmative duty that clergy instruct their congregations, both publicly and privately, on the nature and responsibilities of Holy Matrimony, and the mutual love and forbearance required.
- Section 2 retained the 1904 admonition that ministers conform to the laws of the state governing civil marriage, and added a parallel admonition to conform to the laws of the Church regarding the solemnization of Holy Matrimony.
- Section 3 expanded to five the list of conditions that the minister must discern before solemnizing a marriage. Among the new conditions were verifying that the parties had a right to contract a marriage under church law; instructing the parties on “the nature of Holy Matrimony, its responsibilities, and the means of grace which God has provided through His Church”; and requiring the parties to give the minister at least three days’ notice of their intent to marry. Requirements for at least two witnesses and entry into the parish register were retained.
- Section 4 added a new requirement that the parties to an imperiled marriage must present the matter to the minister who has “the duty ... to labor that the parties may be reconciled.”
- Section 5 retained the 1904 process and expectations for the remarriage of the divorced.
- Section 6 added new provisions and conditions for the annulment or dissolution of a marriage by reason of the presence of one of the listed impediments to the marriage: relationship by blood within the prohibited degree (consanguinity within first cousins); absence of free consent; mistake as to the identity of either party; mental deficiency affecting exercise of intelligent choice; insanity of either party; failure of a party to reach puberty; undisclosed impotence, venereal disease, or facts making the marriage bigamous. Section 6 added a role for the ecclesiastical court in the exercise of judgments on annulment or dissolution petitions as an alternative to presentation to the bishop. A further provision stated that no judgment was to be construed as addressing the legitimacy of children or the civil validity of the relationship.
- Section 7 retained the 1904 provision for excluding from the sacraments persons not married “according to the word of God and discipline of this Church” and the process for review by the bishop. Section 7 added an additional process for admitting persons married by civil authority or “otherwise than as this Church provides” to the sacraments. The process involved judgment by the bishop or ecclesiastical court.

Two of the 1931 proposals were subject to debate and amendment. The Joint Commission’s proposal did not include continuing recognition of the Matthean exception that was added back by the convention. The second major change, removing the right of determining nullity of a marriage from the local clergy to the bishop or ecclesiastical court, has an unclear basis, but a best guess is that clergy were thought to be too lenient with their congregants. Requiring the bishop to make the determination opened the door to more uniform results and more objective consideration. One additional significant change was the omission of the section 3 clause that permitted any minister in his own discretion to decline to solemnize any marriage (White & Dykman, 406-8).

The 1934 convention modified the three days’ notice requirement to allow the minister to waive “for weighty cause” when one of the parties was a member of the minister’s congregation or was well known to the minister — facts which had to be reported immediately to the ecclesiastical authority (White & Dykman, 408).

The report of the Joint Commission on Marriage and Divorce to the 1937 General Convention lamented that the Church's views on divorce and marriage were increasingly ignored by the Church as well as by the public at large. To remedy this concern, the commission made observations about the points of tension, noting that "[a]lmost everyone agrees that the present Canon is inadequate, but there is a wide difference of opinion as to the course that should be followed" (Joint Commission on Marriage and Divorce, quoted in White & Dykman, 409). The report went on to identify three issues:

- Some are slow to make changes, foreseeing difficulties and dangers and hence voting for the status quo.
- Others want to prohibit remarriage or the blessing of a remarriage of divorced persons, a strategy that has failed.
- Still others want to adopt annulment as done in the Eastern Orthodox and Roman churches, observing that "[t]o most Anglicans and Protestants this seems nothing but divorce under another name. In either case it 'puts asunder' those whom, to all appearances and understanding 'God hath joined together.'"

The commission proposed only two minor changes to the impediments section of the canon which were adopted, adding "[I]ack of free and legal consent of either party" and "[i]mpotence or sexual perversion of either party undisclosed to the other" (White & Dykman, 410 [emphasis added]). Sexual perversion would include homosexuality.

The commission proposed more extensive revisions of the marriage canon in 1940 and 1943 without success, receiving unfavorable action in the House of Deputies in a vote by orders. The 1943 convention passed successfully a reorganization of canons related to marriage by transferring section 7 (1931), governing the access of divorced persons to the sacraments, to Canon 15, "Of Regulations Respecting the Laity." Section 4, the duty to seek counseling; section 5, the Matthean exception to the prohibition of remarriage after divorce; and section 6, annulment, dissolution, and the impediments to marriage, became a new Canon 17, "Of Regulations Respecting Holy Matrimony and the Impediments Thereto." And sections 1-3, telling ministers their duties and obligations in solemnizing marriage, became the new Canon 16, "Of the Solemnization of Holy Matrimony."

After almost 80 years of struggle, the 1946 convention eliminated the prohibition of the remarriage of divorced persons, including the Matthean exception. Applying solely to active members in good standing, the revised and renumbered Canon 18, "Of the Regulations Respecting Holy Matrimony," allowed a person whose marriage was annulled or dissolved by a civil court to petition the bishop or ecclesiastical authority of the diocese of canonical residence for a judgment of status or permission to be married by a minister of this Church. A one-year waiting period after issuance of the civil judgment was required, and petition had to be made at least 30 days before the planned date of marriage.

In considering such a petition, the bishop was required to be "satisfied that the parties intend a true Christian marriage," and, if so finding, refer the petition to his council of advisers or the court if the diocese has established one. The bishop or ecclesiastical authority was to base the judgment on, and conform with, the doctrine of the Church, "that marriage is a physical, spiritual, and mystical union of a man and a woman created by their mutual consent of heart, mind and will thereto and is a Holy Estate instituted of God and is in intention lifelong."

Canon 18 references the list of conditions in Canon 17 as forming the basis for the judgment of the ecclesiastical authority. The result of the judgment is that no marriage bond recognized by the Church was established and may be so declared by the proper authority. However, the judgment was held not to say anything about the legitimacy of children or the civil viability of the former relationship. Judgments were to be rendered in writing and kept as a permanent record of the diocese. Any person granted such a judgment could then be married by a minister of the Church (White & Dykman, 416-18). Essentially, the convention accepted remarriage of divorced members as determined by civil law.

Controversy lingered over a perceived ambiguity in Canon 18, Section 2(b), whether the impediments listed in Canon 17, section 2(b), “are shown to exist or to have existed which manifestly establish that no marriage bond [existed].” Some bishops were only willing to consider granting petitions to remarry if the marriage impediment arose before the marriage, a concept of contract law known as nullity *ab initio*, meaning that some defect occurred in the formation of the marriage contract.

Others were willing to recognize that for causes arising after marriage, the marriage bond dissolved. A special committee of the House of Bishops reported to the 1949 convention on this split of opinion by taking the middle way opposing further clarification, stating: “But as a matter of fact there is no ambiguity here. The Canon recognized two points of view as legitimate; one, that if one or more impediments existed before the marriage, no marital bond was created; the other, that if one of the impediments arises after marriage, the marital bond is broken.” The bishops could have it both ways (White & Dykman, 419, quoting the 1949 journal, 439).

The 1946 revision changed the requirement that both parties have received Holy Baptism to requiring that only one party be baptized. The change addressed a disagreement in interpretation that had arisen. Some clergy felt that the nature of Holy Matrimony implied its availability only to baptized persons. This interpretation pushed unbaptized parties to seek instruction and Holy Baptism before being married in the Church, as some clergy refused to solemnize the marriage otherwise. This view is rejected by requiring at least one party to have been baptized (White & Dykman, 414).

The 1949 convention nonetheless made two changes:

- Removed the referral by the bishop to his council of advisers or to a court formed for that purpose;
- Added the requirement that, if the remarriage was to be solemnized in a different jurisdiction than where the judgment is granted, the bishop or ecclesiastical authority of the second jurisdiction had to give approval as well.

These changes left the granting of permission to remarry to the bishop or ecclesiastical authority, without requiring consultation with attorneys, psychologists, a council of advice, or an ecclesiastical court, as had been required in prior times.

Proposals to return to the principle of nullity *ab initio* (1958) and to shorten the one-year waiting period (1970) were defeated.

From 1945 to 1947, a distinct spike in divorce rates was evident in the aftermath of World War II, reaching 43 percent when compared to the number of marriages in 1946. There may have been many reasons for this rise: hasty marriages immediately before deployment to the war, newfound independence among wives on the home front, and inability to undertake the burden of sustaining marriages to returning war veterans who were injured physically or psychologically as a result of their service. Divorce rates leveled off in the 1950s and 1960s averaging about 24 percent over the two decades.

As General Convention prepared to convene in 1973, bishops and deputies submitted from 30 to 40 resolutions calling for amending or repealing the canons on Holy Matrimony. Both houses appointed special committees that met jointly during the first week of the convention, came to agreement on major issues, and drew up proposed amendments to the canons which were adopted by considerable majorities without significant floor changes.

Canon I.16, *Of Regulations Respecting the Laity*, was amended to repeal Section 7 addressing a minister’s withholding of the sacraments from a person “married otherwise than as the word of God and discipline of this Church allow.”

Canon I.17, “Of the Solemnization of Holy Matrimony,” was repealed, and a new canon was adopted in its place.

- Section 1 was retained, requiring clergy to conform to state law governing civil marriage and the laws of this Church governing Holy Matrimony.
- Sections 2 and 3 required clergy to meet the conditions and follow the procedures in solemnizing any marriage. The list of impediments to marriage was eliminated in an effort to move clergy from a legalistic evaluation of the marriage to a more pastoral approach emphasizing the nature of Christian marriage. The clergy were required to instruct and ascertain the understanding of the parties that marriage is a physical and spiritual union entered into in the community of faith by mutual consent of heart, mind, and will intending to be a lifelong commitment. Further, the parties must satisfy the minister that they are entering into marriage without fraud, coercion, mistaken identity, or mental reservation. Section 3 procedures requiring 30 days’ notice to the minister, presence of at least two witnesses, and recording the marriage in the proper register were retained, as was the requirement that the couple sign the “Declaration of Intent” contained in section 3(d), which was first introduced into the canon in 1949. The Declaration of Intent was connected to the required instruction, but it sounded, in fact, more like a confessional statement expressed as the couple’s “understanding” of Christian marriage.
- Section 4 retained the clergy’s discretion to decline to perform any marriage.

Canon I.18, “Of Regulations Respecting Holy Matrimony: Concerning Preservation of Marriage, Dissolution of Marriage, and Remarriage,” was repealed and a new canon adopted:

- Section 1 addressed the duty of the parties and the minister to attempt reconciliation in the face of imperiled marriage unity before filing legal action.
- Section 2 allowed a party who wished to remarry after receiving a civil decree of annulment or dissolution to petition the bishop or ecclesiastical authority for a judgment of nullity or termination. The requirements for this permission were streamlined from earlier versions. Reliance on a civil decree of annulment or dissolution continued.
- Section 3 set out procedures for the minister to follow in preparation for solemnizing the marriage of a party who was previously married to a living spouse. As revised, section 3 made clear that divorced persons could remarry in the Church, and set out the simplified procedures for ministers to follow and obtain the bishop’s consent.
- Section 4 makes Canon I.17 applicable to all remarriages (White & Dykman, 413-15).

No-fault divorce arrived in the 1970s as states changed their laws to move away from the necessity of proving a grievous wrong to the marriage, and toward recognition that marital relationships simply do not work out or meet the expectations of both parties. In the 1980s, equitable distribution of marital property became the law, reducing the battles between divorcing spouses over property as a means of punishing the other or reducing an offending spouse to abject poverty. Divorce rates jumped from 33 percent in 1970 to 50 percent in 1985 as these two legal trends took hold nationwide. Divorce rates continue to run to about 50 percent of marriages in 2014.

The 1973 rewrites of Canons I.16, I.17 and I.18, renumbered as Canons I.17, I.18 and I.19 in 1985, settled the canons on marriage and remarriage for the next 30 years. There have been a few relatively minor changes adopted subsequently:

- In 1979, Canon I.18.3 (now I.19.3) was amended to clarify which bishop would be consulted when a member of the clergy canonically resident in one diocese was licensed to perform a remarriage in another diocese. The canon required consulting with, and reporting to, the minister’s bishop.
- In 2000, Canon I.19.1 was amended to clarify the duty of clergy when consulted by the parties to an imperiled marriage. The prior canon emphasized reconciliation as the purpose of the consultation. Some

clergy apparently took this charge literally, encouraging women in abusive relationships to work matters out without regard to the physical safety of the woman and/or children. Societal, legal, and law enforcement norms regarding domestic violence, spousal abuse, and child abuse changed significantly during the 1980s and 1990s. The amendment changed the charge to reconcile if possible, and imposed an additional duty on the clergy to “act first to protect and promote the physical and emotional safety of those involved and only then, if possible, to labor that the parties be reconciled.”

- In 2000, General Convention further amended Canon I.19.3 to add reporting to the bishop of the diocese where the member of the clergy is canonically resident or the bishop where the member of the clergy is licensed to officiate, and to report to that bishop on the remarriage.

Even though the marriage canons did not change dramatically, discussion of issues related to marriage continued in General Convention in parallel with secular society. These discussions occurred under the umbrella of human sexuality and across interim bodies of the General Convention, debating what the Church should say and do about premarital sex and adultery; infertility and emerging technologies to allow infertile couples to conceive and bear children and surrogacy; abortion and birth control; couples cohabiting without marriage; marriage across religious denominations; interracial marriage; and full inclusion of gay and lesbian, later widened to include bisexual and transgender persons (LGBT), in community.

Calls continue for revision of the canons to permit same-sex marriage or some form of recognition for same-sex relationships; to remove clergy from acting as agents of the state in solemnizing marriage; to allow blessings for same-sex couples, for heterosexual couples who choose not to marry for financial reasons, and for immigrants living illegally in the United States. These issues will be considered further in the critique of the present canons.

### **3. Critique of the Current Marriage Canon (Canon I.18)**

This section will review current marriage-canon-related issues that have come under discussion in the Church in recent years; discuss whether and how the canon might address those issues; and suggest how the canon might be revised to resolve the issues.

Canon I.18, “Of the Solemnization of Holy Matrimony,” commonly known as the Marriage Canon, outlines the current regulations of this Church regarding marriage. Its companion Canons I.17, “Of Regulations Respecting the Laity,” and Canon I.19, “Of Regulations Respecting Holy Matrimony: Concerning Preservation of Marriage, Dissolution of Marriage and Remarriage,” also address regulations related to Holy Matrimony and marriage.

As the historical review shows, the marriage canons are regulatory in nature. The marriage canons reflect the current thinking about how marriage occurs in the Church and, with the exception of Canon I.17, apply to clergy only, describing the duties and responsibilities of clergy who officiate at the solemnization of marriage. To the extent that the rules require the clergy to assure that the couple seeking to marry complies with certain duties, the laity is also regulated. But it is clergy who are subject to Title IV discipline, should the member of the clergy fail to conform to the marriage canons.

Canon I.18.1: should the Church move away from clergy acting as agents of the state in solemnizing marriage?

Sec. 1. Every Member of the Clergy of this Church shall conform to the laws of the State governing the creation of the civil status of marriage, and also to the laws of this Church governing the solemnization of Holy Matrimony.

Canon I.18.1 sets out the requirement that the clergy conform to both civil law and church law when solemnizing Holy Matrimony. Generally, state law requires a license issued to the couple, signed by the

officiant, and returned to the recording agency for registration, subject to penalties for the officiant who fails to file the license; consent of the couple, freely, seriously, and plainly expressed in the presence of the other; in the presence of a designated officiant; and with a declaration or pronouncement by the officiant that the couple are married according to state law.

Officiants are designated government officials such as magistrates, justices of the peace, and judges; and ordained ministers of any religious denomination or ministers authorized by a church. This provision sets up a dual role for the clergy officiating at Holy Matrimony, reflected in the pronouncement in the BCP Marriage Rite, “I pronounce that they are husband and wife, in the Name of the Father, and of the Son, and of the Holy Spirit.” In that dual role, the clergy sign and file the civil marriage license, record the marriage in the church register, and pronounce and bless the marriage. While the state-law qualifications to obtain a marriage license may overlap with the canon-law qualifications to marry, each also has its separate requirements that will be addressed in the discussion of Canon 1.18.2 and 1.18.3.

Some clergy have expressed increasing discomfort with that dual role on behalf of both state and church. Some express reluctance to act as agents of the state, reflecting the culture of separation of church and state in the United States. Some recognize that Episcopal clergy in some European and Latin-American dioceses function within the model where a separate civil ceremony is later blessed in a church setting, such as in some European and Latin-American dioceses.

Indeed, the Book of Common Prayer contains a separate rite, “The Blessing of a Civil Marriage,” for this purpose. A few have taken a stand on the prohibition of same-sex marriage, declaring that they would not officiate at any marriage until they could marry every couple who desired to commit themselves in marriage. Some clergy, and a greater number of laity, recognize the symbolism and emotional attachment to signing the civil marriage license within the marriage liturgy and, in some places, on the altar itself.

Remarkably, despite the raising of this concern, no legislative proposals to change the model in this Church have come before General Convention since 1994. Resolution 1994-D102 proposed to strike the phrase, “to the laws of the State governing the creation of the civil status of marriage and also” and was referred to the Standing Committee on Constitution and Canons for further study. The 1997 Blue Book Report from Constitution and Canons made no mention of their consideration of this change and made no recommendation to amend the canons to eliminate conformity with state law.

The Task Force on the Study of Marriage recommends the following amendment of Canon 1.18.1, retaining the dual conformity to state law and church canons, along with three additional changes:

**CANON 18: Of the Solemnization of Holy Matrimony**

*Canon 18: Of the Celebration and Blessing of Marriage*

Sec. 1. Every Member of the Clergy of this Church shall conform to the laws of the State governing the creation of the civil status of marriage, and also to ~~the laws of this Church governing these canons concerning the solemnization of marriage Holy Matrimony.~~ *Members of the Clergy may solemnize a marriage using any of the liturgical forms authorized by this Church.*

First, the canon is renamed to reflect and connect to the title of the marriage liturgy in the Book of Common Prayer, and “Holy Matrimony” is changed to “Marriage” accordingly. Second, the wording, “the laws of this Church governing” marriage is clarified by making specific reference to the canons. And, third, the last sentence is returned to section 1, having been moved in 1973 from section 1 to section 3 setting out the Declaration of Intent. This sentence gives recognition to the current situation in which General Convention has authorized a number of liturgical forms that are not yet incorporated into the Book of Common Prayer.

Amending the Book of Common Prayer remains the third rail in The Episcopal Church, reflecting the residual bitterness of the battles over adoption and reception of the 1979 version.

Canon I.18.2: What criteria should the clergy evaluate before solemnizing a marriage? Should the canon restrict marriage to one man and one woman? Should the canon recognize same-sex marriage marriages, and under what conditions (for example, where authorized by state law)?

Sec. 2. Before solemnizing a marriage the Member of the Clergy shall have ascertained:

- (a) That both parties have the right to contract a marriage according to the laws of the State.
- (b) That both parties understand that Holy Matrimony is a physical and spiritual union of a man and a woman, entered into within the community of faith, by mutual consent of heart, mind, and will, and with intent that it be lifelong.
- (c) That both parties freely and knowingly consent to such marriage, without fraud, coercion, mistake as to identity of a partner, or mental reservation.
- (d) That at least one of the parties has received Holy Baptism.
- (e) That both parties have been instructed as to the nature, meaning, and purpose of Holy Matrimony by the Member of the Clergy, or that they have both received such instruction from persons known by the Member of the Clergy to be competent and responsible.

As recently as the 2012 General Convention, a proposed amendment to Canon I.18.2 (b) changed “a man and a woman” to “two persons” (Resolution 2012-D091); the amendment was referred to the Task Force for consideration. Reflecting the theological views presented elsewhere in this report, the Task Force has come to the position of recommending recognition of same-sex marriage in this Church.

Appearing initially in 1946 in what was then Canon 18 (now Canon I.19) regulating remarriage after divorce, the Bishop or Ecclesiastical Authority was directed to apply the following standard to decisions to grant an application for remarriage:

The Bishop or Ecclesiastical Authority shall take care that his or its judgment is based upon and conforms to the doctrine of this Church, that marriage is a physical, spiritual, and mystical union of a man and a woman created by their mutual consent of heart, mind and will thereto, and is a Holy Estate instituted of God and is in intention lifelong; ...

The phrase, “a physical and spiritual union of a man and a woman” was moved to then Canon 17 (now Canon I.18) in 1973, at a time when the concept of same-sex marriage arose for the first time. Baker v. Nelson,<sup>35</sup> decided in the Minnesota Supreme Court in 1971 and turned down for review by the Supreme Court of the United States in 1972, was the first known attempt to establish a constitutional right to marriage for a same-sex couple.

It may be better understood as a description of the then-current understanding of marriage — one which has undergone considerable revision in subsequent years. Indeed, General Convention began three years later to affirm the pastoral needs and concerns of homosexual persons. (Resolution 1976-A069). General Convention 1997 called for continued study of the theological aspects of committed same-sex relationships (Resolution 1997-C003).

In 2000, General Convention recognized the presence of “other life-long committed relationships, characterized by fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God” (Resolution 2000-D039). In 2012, after much study and call for a new liturgy to bless same-sex relationships, General Convention authorized the liturgy, “The Witnessing and Blessing of a Lifelong Covenant,” for provisional use

<sup>35</sup> Baker v. Nelson 291 Minn. 310, 191 N. W. 2d 385 (1971), appeal denied 409 U.S. 810 (1972)

under the direction of diocesan bishops. This Church has reached a point, as has civil society, where same-sex relationships are no longer “other” and have become “equal” and should be recognized as such.

The proposed revision retains the requirement of subsection (a) that clergy ascertain that the couple may contract the marriage under state law. Although state law is rapidly changing, it is not yet uniform regarding the legalization of same-sex marriage. That recognition is expected to accelerate in the face of the Supreme Court of the United States’ decision to deny review to the Court of Appeals decisions in three circuits, letting stand decisions ruling state bans on same-sex marriage unconstitutional. The legal landscape will remain in flux as the various lawsuits currently on file in the remaining states that have not yet recognized same-sex civil marriage are addressed and resolved.

While the apparent trend is toward striking down state bans, opportunities to uphold the ban remain viable as the grounds on which the bans are challenged are varied and not yet clearly resolved. Consequently, opportunities for this Church to recognize same-sex marriage will continue to depend on state law, which continues to vary from state to state. That should not deter General Convention from addressing how the Church extends a generous pastoral response to its LGBT members who wish to have their loving, committed relationships recognized and blessed by this Church where same-sex marriage is legal.

Subsection (b) is deleted in the proposed revision. The current wording does not reflect the understandings of marriage expressed in the marriage liturgy, which makes no mention of “a physical and spiritual union of a man and a woman” but instead speaks of “[t]he union of husband and wife in heart, body and mind” but not in spirit. Like the Declaration of Intent, it sounds like a creedal statement that the couple is asked to affirm rather than the aspirational statement it is. Deleting subsection (b) also removes the temptation to read “a man and a woman” as a definition of marriage rather than a description.

Subsections (c), (d) and (e) are relocated to section 3 with minor rewording.

Canon 1.18.3: What procedures should be required? Should the Declaration of Intent be retained? How should the Declaration of Intent be modified to recognize same-sex marriage?

Sec. 3. No Member of the Clergy of this Church shall solemnize any marriage unless the following procedures are complied with:

- (a) The intention of the parties to contract marriage shall have been signified to the Member of the Clergy at least thirty days before the service of solemnization; Provided, that for weighty cause, this requirement may be dispensed with if one of the parties is a member of the Congregation of the Member of the Clergy, or can furnish satisfactory evidence of responsibility. In case the thirty days' notice is waived, the Member of the Clergy shall report such action in writing to the Bishop immediately.
- (b) There shall be present at least two witnesses to the solemnization of marriage.
- (c) The Member of the Clergy shall record in the proper register the date and place of the marriage, the names of the parties and their parents, the age of the parties, their residences, and their Church status; the witnesses and the Member of the Clergy shall sign the record.
- (d) The Member of the Clergy shall have required that the parties sign the following declaration:
- (e) "We, A. B. and C. D., desiring to receive the blessing of Holy Matrimony in the Church, do solemnly declare that we hold marriage to be a lifelong union of husband and wife as it is set forth in the Book of Common Prayer.
- (f) "We believe that the union of husband and wife, in heart, body, and mind, is intended by God for their mutual joy; for the help and comfort given one another in prosperity and adversity; and, when it is God's will, for the procreation of children and their nurture in the knowledge and love of the Lord.
- (g) "And we do engage ourselves, so far as in us lies, to make our utmost effort to establish this relationship and to seek God's help thereto."



Section 3 sets out specific procedures for clergy to follow when requested to officiate at a marriage. Subsection (a) sets a notice requirement: the couple must make the request known at least 30 days in advance, but it allows for waiver at the discretion of the member of the clergy. Waiver is permitted for a member of the congregation. Waiver may also be considered when a party can provide satisfactory evidence of a good reason to waive the waiting time. Deployment in the military and pregnancy are two such situations to have received waivers, at least in the past. Marriage after childbirth is more common today. Issuance of a waiver may lie within the member of the clergy's discretion but must be reported to the bishop immediately.

The proposed revision retains Section 3(a) renumbered Section 2. Both parties must be involved in the presentation of a case for waiving the 30 days' notice requirement, and the additional language, "shortening the time," is inserted, suggesting that marriage upon demand is not sanctioned.

Subsection (b) requires that the ceremony occur in the presence of at least two witnesses. State law frequently requires the presence of at least two witnesses who sign the civil marriage license.

Subsection (c) spells out the information to be entered into the church registry. Subsections (b) and (c) are combined as Section 4 in the proposed revision.

Subsections (d)-(f) spell out the Declaration of Intent, which the member of the clergy must have the couple sign before proceeding with the marriage. The prescribed declaration is a series of statements to which the couple must assent: marriage is lifelong; a union of heart, body, and mind, intended by God for mutual joy, for help and comfort in prosperity and adversity, and for the procreation and nurture of children when God so wills; and pledges the couple's utmost efforts to establish the relationship with God's help. Traditionally, the prescribed declaration is signed as part of the required pre-marriage counseling.

The proposed revision of Canon I.18 deletes the declaration from the canon. The language of the declaration rings as a creedal statement, a statement of belief that may not be accurate. The couple is required to declare their belief in a set of statements about marriage; but the intentions of marriage are properly about performance, not belief. Since baptism is required for only one partner to the marriage, the declaration may force a false compliance on a nonbeliever or a person who holds to a tradition with a different theology of marriage or no theology at all.

An unbaptized nonbeliever or an atheist may marry in church for the sake of a spouse, but that person ought not to be placed in the situation of affirming a belief about whether marriage is "intended by God." Again it is the performance of the content of the vows that is the proper focus of the couple's intention. The marriage liturgy itself includes the Declaration of Consent, as well as the vows, and the wording in the proposed canonical revision points to these as the operative texts.

In lieu of the declaration, the proposed revision expands the essentials of the required pre-marriage counseling, basing the counseling upon the vows the couple will pledge to each other and on an assessment by the member of the clergy that the couple understands the duties and responsibilities of marriage. Also added is recognition that the community plays a role in supporting the marriage, a recognition that is also reinforced in the liturgy.

The proposed revision adds a new section 5, giving recognition that in the civil jurisdictions of some dioceses of The Episcopal Church, the civil ceremony and the church blessing are undertaken separately. While the requirement that clergy conform to the civil law of their jurisdictions may already encompass this situation, especially since there is a liturgy for the blessing of a civil marriage, explicit recognition of the different context is desirable.

Canon I.18.4: Shall clergy continue to have sole discretion to decline to solemnize any marriage?

Finally, the proposed revision retains section 4:

Sec. 4. It shall be within the discretion of any Member of the Clergy of this Church to decline to solemnize any marriage.

Bishops and clergy alike have called for retaining this discretionary authority. The clause in the context of heterosexual marriage allows the clergy to make a subjective decision regarding the particular couple seeking marriage. Clergy have expressed a desire to retain the ability to refuse marriage without repercussions in appropriate cases.

Some support for retention is the belief that in this transition time there should be a “conscience clause” to accommodate those for whom same-sex marriage violates their personal beliefs. The clause in the context of same-sex marriage would permit continued discrimination against a class of church members. Such discrimination appears to be prohibited by Canon I.17.5:

Sec. 5. No one shall be denied rights, status or access to an equal place in the life, worship, and governance of this Church because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, disabilities or age, except as otherwise specified by Canons.

A similar conscience clause was enacted in conjunction with the ordination of women with unsatisfactory results. The unrealized intent that gradually all bishops would come on board and ordain women did not occur. Rather it contributed to a division in this Church that caused some clergy and laity to feel devalued, and eventually they left. In the context of the decision to allow women clergy to serve as bishops in the Church of England, accommodation of those who, for reasons of theological belief and conscience would not accept or recognize women bishops, has been a central point of contention.

Similar results might occur in the context of same-sex marriage over the long term. Assuming that the conscience can change or can be changed through legislation is misplaced. Similar battles continue in the civil context as well, where legislators are introducing exceptions to permit government officials to refuse to perform same-sex marriages without losing their jobs. So far, the civil judiciary has rejected such exceptions to a fundamental right to marry.

While recognizing the potentially discriminatory aspects of the call for retaining section 4, the Task Force on the Study of Marriage nonetheless supports retaining the discretion of clergy in deciding whether to marry a particular couple. A better approach is to amend Canon I.17.5 to delete the last phrase, “except as otherwise specified by Canons,” thus banning discrimination against the enumerated classes altogether.

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## ESSAY 6: Agents of the State: A Question for Discernment

Over the last decade, as Episcopalians have discussed our theology of marriage and the place of marriage in the life of the Church, the role of clergy as agents of the state in solemnizing civil marriages has come under consideration. Increasingly, the question has emerged, “Should we be in the marriage business?” Usually when this question is raised, the question is not whether we should perform Christian marriages in our churches.<sup>36</sup> Rather, the question is whether in these celebrations clergy should also legally solemnize civil marriages as agents of the state. That is, should clergy sign marriage licenses and return them to the town clerk? In the United States this is the action that renders a couple legally married in the eyes of the state, regardless of the vows they make in church.<sup>37</sup>

### 1. Invisible/Visible

In the life of many congregations, this interface with civil marriage may be nearly invisible. The signing of the marriage license may take place off to the side, perhaps in a sacristy. Many people may not realize that clergy routinely perform double duty when they officiate at marriages, acting as agents of both church and state. In contrast, in states with marriage equality and in which congregations have permission to officiate at same-sex weddings, the signing of the marriage license may well take a place of honor. And indeed, due to this new attention to the role of clergy in signing marriage licenses, some may be newly aware of this double duty.

### 2. Strategic Disengagement

Some congregations have sought to pause or eliminate this double duty, however. In dioceses where same-sex and different-sex couples might experience legal or ecclesial discrepancies in access to marriage, some congregations have taken up a new policy. They require the marriages of all couples to be solemnized by a civil official before being blessed in the course of the church liturgy. Here the concern is to treat all couples equally, regardless of sexual orientation.<sup>38</sup> Such congregations are emulating, in their own way, some European countries (for example, France), where couples have historically married first at a courthouse or mayor’s office and then later joined their communities at their places of worship.<sup>39</sup>

Some have further argued from a position of support for same-sex couples that even where marriage equality is legal and there are no discrepancies of access between civil and ecclesial marriage, clergy in The Episcopal Church still should no longer legally solemnize any marriages. At the same time, others are beginning to urge a similar practice of strategic disengagement to critique the expansion of marriage to include same-sex couples.<sup>40</sup> Here the concern is to stand apart from understandings of marriage that are not strictly heterosexual. Both of these perspectives express concern about how serving as agents of the state may compromise their ability to bear authentic witness to their understandings of Christian marriage, and perhaps even of the gospel itself.

### 3. Pastoral Concerns

Not surprisingly, Episcopalians have varieties of responses to these practices of strategic disengagement. While many proponents of marriage equality prefer having a civil official sign the marriage license, other

<sup>36</sup> One exception to this argument can be seen in “Familiar Idolatry and the Christian Case against Marriage,” by Dale Martin, in *Sex and the Single Savior: Gender and Sexuality in Biblical Interpretation* (Louisville: Westminster John Knox, 2006), 122: “I am deeply ambivalent about pursuing same-sex marriage as a solution to the injustices of homophobia. I believe that both the state and the church should get out of the marriage business.”

<sup>37</sup> V. Gene Robinson, *God Believes in Love: Straight Talk about Gay Marriage* (New York: Vintage, 2013), 141.

<sup>38</sup> Robinson describes such a scenario on pp. 144-45.

<sup>39</sup> Robinson, 144.

<sup>40</sup> See, for example, the Reverend Ephraim Radnor and the Reverend Christopher Seitz, “The Marriage Pledge,” <http://www.firstthings.com/marriage-pledge>

proponents have wondered why the Church might question its role as an agent of the state in marriage at a time when more dioceses may be prepared to extend that practice to same-sex couples. People of various perspectives have further wondered about the pastoral impact that might be felt by couples and families across the Church if we were to require all couples to engage a civil official as well as a clergyperson as part of “how we do marriage.” It may well be that in France, such duality of practice is widespread, this line of reasoning explains, but in the United States a shift to this model could simply feel alienating in our congregations.

#### **4. Whether and/or How**

On this question, therefore, it seems clear that we have some discernment in which to engage as a church. Having approached Christian marriage through a vocational lens in the paper “Christian Marriage as Vocation,” the question arises as to whether and/or how the Church may be called to serve as an agent of the state in this arena. In *God Believes in Love*, Bishop V. Gene Robinson describes a fictional scenario in which a church has discerned a call not to have its priest serve as an agent of the state.<sup>41</sup>

Yet how exactly did this congregation embody this distinction? In Robinson’s example, the congregation’s senior warden serves as an agent of the state for all marriages at the parish. The warden signs the marriage license of all couples in the doorway at the back of the Church, embodying quite literally the border of the civil and ecclesial spheres. While wardens are not clergy, they are members of their parishes. Therefore, although the distinction between church and state is indeed much clearer here than it is when a clergyperson signs the marriage license, the parish as a community is still making a conscious decision to interface with civil marriage in a particular (in this case, spatial) manner. The community might have asked all couples to have their marriage licenses signed someplace outside the Church altogether, for instance. A congregation might choose a path of greater church-state linkage or separation, and it might do so in a number of different ways. Thus the discernment is not only *whether* a parish might or might not decide to participate in civil marriage, but potentially *how*.

#### **5. Implications for Discernment: Unjust Structures**

Our discernment process should also consider the ways in which our participation in civil marriage may contribute to the status of privilege accorded to marriage in the civil as well as ecclesial spheres. The paper, “Christian Marriage as Vocation” points out that marriage is both a profound vocation in its own right as well as a manner of life to which some (but not all) are called. Our canons further specify that equal access to a “place in the life, worship and governance of this Church” cannot be denied on the basis of marital status (Canon 1.17.5).

Yet a further question to consider is how the Church’s participation in civil marriage may contribute to marriage in the civil sphere more broadly. In what ways might that participation interface with our call to help transform unjust structures in that sphere?<sup>42</sup> Our discernment process might consider, for instance, how health insurance and tax benefits are linked to civil marriage, how unevenly civil marriages are recognized by the states at present, and how profoundly that lack of recognition can impact the daily lives and basic needs of those who remain unrecognized. It is one thing for the Church to embrace the widespread discernment of vocations to Christian marriage, but how we interface with its civil recognition is a distinct matter.

#### **6. Implications for Discernment: Ecclesiology and Mission**

How we discern our call to interface with civil marriage down the road clearly emerges in important ways from our theology of marriage. Yet further theological considerations should also prompt our reflection.

<sup>41</sup> Robinson, 144-45.

<sup>42</sup> “To seek to transform unjust structures of society, to challenge violence of every kind and to pursue peace and reconciliation” is the fourth of the Five Marks of Mission which were adopted as strategic priorities at the 76th General Convention (D027) and reaffirmed at the 77th General Convention (A007). For more on the Five Marks of Mission, see <http://www.anglicancommunion.org/ministry/mission/fivemarks.cfm>

While our canons currently prohibit the solemnization of marriages that are not considered legal according to the laws of the state (Canon I.18.2), the two Task Force papers on biblical and theological dimensions of marriage suggest that our theology of Christian marriage does not emerge from marriage's civil status.

Discernment related to this question — of whether and/or how to serve as agents of the state — should arguably flow more fundamentally from our ecclesiology and understanding of mission. How might our theological understanding of the Church, and particularly of its vocation at its interfaces with the civil sphere, inform this discernment? This solemnization question challenges us to clarify how we are called to be agents of the Good News at the borders of the ecclesial and civil. Does our service as agents of the state enable us to be better agents of reconciliation and transformation in the world than we otherwise would be? Does it make us complicit in the furthering of injustices in that world? What if our participation catches us up in both? If that is the case, how might we discern not simply the lesser of two evils but instead the expansion of the greater good?

Whatever we ultimately discern, the clear mandate from our baptism to respect the dignity of every human being (1979 BCP, 305) calls us both now and in the long run to be consistent in our practice, regardless of the sex, sexual orientation, or gender identity and expression of the prospective spouses, just as we already should be with respect to their race, color, ethnic origin, national origin, disability, or age (Canon I.17.5). Should the General Convention decide in the future, for example, to limit the scope of the Church's engagement in marriage to its theological, liturgical, and pastoral facets and to canonically decouple Christian marriage from its legal, civil counterpart, we should engage this process with consistency across the demographic particularities of our communities. All of this calls for careful conversation, reflection, and prayer.

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## ESSAY 7: Changing Trends and Norms in Marriages

### Executive Summary

From the moment it is published, a report entitled, “Changing Trends and Norms in Marriages” will necessarily be challenged to stay abreast of society’s rapidly evolving views, laws, and practices. We also recognize that further research and data gathering from non-U.S. Episcopal Church dioceses and from our ecumenical and Anglican partners is needed.

Our executive summary, therefore, offers a synthesis of some of the emerging trends and norms we have discerned, and suggests questions that our Church might consider. Much has changed in terms of how people approach marriage, and when and how they decide to make such a commitment. Educational differences, economic issues, age, race, and ethnicity are among the myriad of factors impacting marriage in North America and Western Europe, as well as in Latin-American and Asian countries. Yet, the Task Force on the Study of Marriage also noted some trends that transcend all variables:

- The age at which people enter into a first marriage is rising.
- The rates at which people are marrying are significantly declining.
- Student debt and job insecurity are prevalent reasons cited for delaying marriage.
- For women, delayed marriage can often bring an “income advantage” as they pursue their careers.
- Delayed marriage, especially among less-educated adults, has a significant economic impact especially for children raised in households with unmarried partners or with single parents.
- For those young adults, raising children in cohabitating and serial partnerships is becoming the new norm.
- Forty-eight percent of all first births are to unmarried women.
- Cohabitation prior to marriage has increased by nearly 900 percent over the last 50 years.
- Acceptance of same-sex marriage is growing, though not in all racial or ethnic communities.
- As of late 2014, 64 percent of Americans live in states where same-sex couples may marry.
- As of late 2014, 64.3 percent of Episcopalians in 64 U.S. dioceses live in states or jurisdictions where same-sex marriage is legal.

The rate at which people are marrying has been declining precipitously. The option — especially for young adults to enjoy what they consider the benefits of marriage through cohabitation and extended relationships while remaining single — is increasingly appealing to them. Research consulted by the Task Force reveals, however, that most teenagers report that having a “good” marriage “one day” is still their desire. That same data, however, illustrate that the median age at which both women and men enter into their first marriage is rising.

Researchers have identified this declining trend in marriage alongside the ever-shrinking middle class as the “Marriage Gap,” with noted disadvantages for young adults with less education. Interestingly, we note that the decision to delay marriage does not necessarily mean postponing entrance into parenthood. This has caused the coining of another term by researchers known as the “Great Crossover.” The result is that almost half of all new births now are to unmarried women.

Data are clear that unmarried couples break up more frequently, often leaving young mothers to be responsible for raising their children alone. This contributes to, or begins a cycle of, poverty that can exist for generations. This reality underscores the need for educational, economic, and family policies that do not complicate and unnecessarily stress an already fragile situation for parents and children.

The evidence is irrefutable that a high school education alone is no longer enough to lift individuals out of poverty. At the same time, burdensome student debt can not only prevent a mother, for example, from emerging from poverty, but may also contribute to a delay in marriage. Mass incarceration, particularly of a disproportionate number of young black men, is still another factor contributing to decisions by couples to delay marriage.

The Task Force attempted to better understand the role one's race and ethnicity might play in terms of deciding whether to marry or not. Among the interesting data uncovered was that African-American teens are less likely to date or participate in serious romantic relationships than are teens from other racial or ethnic groups. In the wider Hispanic and Latino community, familial relationships are considered even more essential to community life than the marriage itself, and divorce rates among Hispanic men and Latina women are lower by comparison with the general population.

The clan system found in many tribes in the Native-American community is actively engaged in childrearing, with elders in particular playing important roles. Asian Americans have the highest percentage of marriage and the lowest divorce rate. A high value on marriage where the extended family is an integral component is an aspect of Asian culture.

Additionally, there has been a seismic shift in cultural acceptance of same-gender marriage in the United States, especially within the last decade. However, this shift in increasing acceptance of marriage between same-sex couples is by no means limited to the United States. Indeed, governments and citizens in countries from every continent have embraced marriage equality and have actually outpaced the United States in making this shift.

Virtually every religious tradition has been engaged in discussing what these shifting norms mean for their believers and followers theologically and liturgically. Recent decisions, especially by the Presbyterian Church USA and the Evangelical Lutheran Churches in America, have garnered much attention. Even more recently, and as this report was being prepared, bishops in the Roman Catholic Church were wrestling with an expressed desire by Pope Francis to embrace members of the faith that had been excluded due to cohabitation, divorce, and childbearing outside of marriage. A desire not to judge others due to sexual orientation was also recently expressed by the pope. We cite these as significant examples of religious institutions' recognizing and responding to changing norms for and among the faithful.

The Task Force on the Study of Marriage invites you to read the full extent of our research in the pages that follow and to consider the following questions and others that may come to mind as you review this section of our report:

- How might the Church engage the significant justice issues related to marriage that so impact educational and economic opportunities?
- What changes to family law, the tax codes, student loans, and other public policies might address the changing norms around marriage?
- What resources can the Church bring to help alleviate stress and strain on individuals desiring marriage but unable to make such a commitment due to economic and other factors?
- What can the Church contribute to the conversation that would be helpful for young people as they make decisions about cohabitation versus marriage?
- How could the Church lead an effort to bring about alternatives to the mass incarceration of large numbers of young black men that has such dire consequences for marriage and family life in the African-American community?
- What would be the best way for the Church to learn from and share the "best practices" around marriage offered by different racial and ethnic groups?



- What changes might The Episcopal Church make to our liturgies for marriage to better embrace the emerging realities of delayed marriage, childbearing prior to marriage, marriage with blended families, and same-sex marriage?
- What guidelines and pastoral resources might we develop for our clergy that they might better respond and prepare couples for lifelong covenants of mutual joy, respect, and fidelity?

### **1. The State of Our Unions**

On the one hand, our culture seems to be fixated on marriage, from the extravagant \$50 billion spent annually on weddings, to our active debate on same-sex marriage. On the other hand, societal norms and trends concerning marriage are in flux. Divorce rates have declined since the mid-1980s — a positive trend. Yet, another significant trend is emerging. The rates at which people are marrying are significantly declining, especially among those whose highest level of education achievement is a high school diploma. For those young adults, raising children in cohabitating and serial partnerships is becoming the new norm. For example, by age 25, 44 percent of women have given birth, while only 38 percent have married. Overall, 48 percent of first births were to unmarried partners.

Why should we care? Marriage is not merely a private matter; it is also a complex social institution. Stable marriages better the chances for stable families, generally ensuring greater prosperity for individuals and families as a whole. Marriage contributes to the stability of neighborhoods and school systems, and helps families and individuals weather difficult economic times. Indeed, researchers are finding that the disappearance of the middle class in the United States directly correlates in many communities with the decline in marriage.

The 1979 Book of Common Prayer emphasizes that marriage is both a private matter for the couple and a public covenant. The underlying assumption in our prayer book is that the very private love of the couple entering into marriage has public and sacramental value to the community as a whole — they are to “make their life together a sign of Christ’s love to this sinful and broken world, that [their] unity may overcome estrangement, forgiveness heal guilt, and joy conquer despair” (“The Celebration and Blessing of a Marriage,” 429).

What follows in this section of our report are some of the changing trends and norms in marriage in the United States, Canada, and much of Western Europe. This report is based on several studies that are noted at the end of this document. Information about current trends and norms in countries outside the United States where dioceses of The Episcopal Church are located is less available; however, in conversation with bishops from those dioceses, we can identify some of the realities on the ground. Some are similar to those found in the research related to North American and Western European countries, and some are not. Our report highlights some of those findings, even as we continue to do additional research.

In the United States, annual surveys continue to report that teens plan to marry “one day” and that having a “good” marriage is “extremely important” to them. At the same time, the median age for a first marriage has risen sharply — now 27 for women and 29 for men. Researchers link this phenomenon to the rapid rise in rates of cohabitation and to a dramatic increase in the number of children born outside of marriage. A growing number of couples, both young and old, now live together with no plans eventually to marry.

Additionally, as the historian Barbara Dafoe Whitehead has recently written, “Four decades ago, moderately educated Americans led the kind of family lives that looked much like the family lives of the more highly educated.” She continues: “Today, they are less likely to achieve a stable marriage, or even form one in the first place.” The plight of this demographic in our society — that is, those who still aspire to marriage but increasingly are unable to achieve it — may be the silent social and economic issue of our times.

The decline of marriage in America is trending directly alongside the decline of the imperiled middle class and is seen to help foster a society of winners and losers. Pew researchers have referred to this as the “Marriage Gap,” a phenomenon increasingly aligned with the growing income gap. Marriage remains the norm for adults with a college education and a good income but is now markedly less prevalent among those on the lower rungs of the socioeconomic ladder.

## **2. The Rising Age of Marriage — Costs and Benefits**

With the exception of the three decades following World War II, people in the United States and other western nations have been notable for their leisurely approach to settling down. In 1900, the median age of marriage for women in the United States was 23, and for men, about 26.

As noted above, the age at which men and women marry is now at historic heights and is still climbing. A report from a University of Virginia study of marriage entitled, “Knot Yet” explored the positive and negative consequences of delayed marriage for twenty-something women and men, their children, and the nation as a whole. Their findings are recapped below:

### *Benefits*

- Women enjoy an annual income premium if they wait until age 30 or later to marry.
- Delayed marriage has helped bring down the divorce rate in the United States since the early 1980s, because people who marry in their late teens or early twenties are more likely to divorce than couples who marry later.

### *Costs*

- Though couples are postponing marriage into their late 20s and beyond, they are not putting off childbearing at the same pace. Known as the “Great Crossover,” this phenomenon has resulted in a historic new trend in which, by age 25, 44 percent of women have had a child, while only 38 percent have married. Overall, 48 percent of all first births are to unmarried women.
- Twenty-somethings who are unmarried report a higher rate of substance abuse than their married counterparts, and report lower levels of satisfaction with their lives than do married twenty-somethings.
- Evidence shows that there is an earning advantage known as the “marriage premium,” especially for men. Studies are lacking that examine racial-ethnic groups separately to account for discrimination factors.

Marriage delayed is the centerpiece of two different potential life paths for members of the next generation — paths that significantly depend on whether or not the person who delays marriage is college-educated. The University of Virginia marriage research project indicates that the Great Crossover is part of a “sad and ironic cycle” — both a generator of, and a response to, the economic troubles enveloping Middle America. Young couples with children may defer or stay clear of marriage because a parent does not have a decent-paying job. But unmarried couples break up more often, leaving mothers raising children alone, and reinforcing generational cycles of family instability and poverty.

Of particular interest to the Task Force on the Study of Marriage were the conclusions drawn by the researchers involved in the University of Virginia study. Their recommendations focused on three crucial areas: educational and economic policy, family policy, and relationship culture. These recommendations might be of value as our Church tries to better understand our mission to support and sustain living-giving relationships. We cite three interesting examples below:

1. Even when marriage is not immediately on the horizon, we can assist young adults to see their romantic relationships as opportunities to grow in love and commitment.
2. Parents and peers (and we would add faith communities) should encourage today’s twenty-somethings to develop their plans for parenthood and marriage to align with plans for their sexual behavior.

3. Student debt and job insecurity cause large percentages of twenty-somethings to delay or avoid marriage (though not childbearing). What can our Church do to support educational policies and reform that foster relationship and family stability?

### **3. Explaining the Marriage Delay Phenomenon**

Again with a primary focus on data from the United States, in the 1970s, a man (the assumption then being that men were the primary source of family income) with a high school diploma could count on finding a good blue-collar job that paid a living wage at an establishment where he could continue to work until he retired with a comfortable pension. By their late teens or early 20s, the men of this era were ready to support families. Now this world is all but gone. Today young adults without a high school education have little hope for a stable job. Since the Great Recession, the same can be said for those who have completed high school. Marriage for these young adults is delayed until they feel they can find jobs that will provide them with a middle-class lifestyle. Lack of economic opportunity, financial insecurity, and student debt all contribute to the delayed-marriage phenomenon. And one must not forget the impact that the mass incarceration of young black men has had on all aspects of the African-American community, delayed marriage being only one of the many serious consequences.

Another reason for putting off marriage is more personal, especially for women. Today women expect, and are expected, to become economically independent. In addition to the self-fulfillment aspects of a career for women, earning potential is seen as a hedge against poverty should their marriage end. Indeed, a recent poll of high school seniors — those on the cusp of adulthood — found that nearly half did not expect to remain married to the same person for a lifetime, a stunning statistic in its own right. Women also place a high value on a career that brings income and personal meaning — an accomplishment that requires years of education and on-the-job experience.

While earlier generations looked at marriage as their entry point into adulthood and a crucial vehicle for defining themselves as mature individuals, today young men and women expect to achieve individual and autonomous identities before they become bound as a couple. The psychologist and researcher Jeffrey Jensen Arnett calls it “emerging adulthood,” an extended time of exploration and of trying out various possibilities in love and work. In this new environment, marriage is transformed from a “cornerstone” to a “capstone” of adult identity.

Ninety percent of young adults believe that they must be completely financially independent, have finished their education, have substantially paid off student loans, and be stable in their careers before they marry. Twenty-five to thirty-five percent believe they should be able to pay for their own weddings and have purchased a home before tying the knot.

Also helping to redefine marriage is what many sociologists call the “soul mate ideal.” As women have become more economically equal and empowered, marriage for them has been drained of its primary economic incentive. Young adults are now more inclined to focus on marriage for its potential for deep emotional and sexual connections.

### **4. The Desire to Marry**

Some might see the decline or delay of marriage as proof that young people think marriage is obsolete. However, the large majority of young adults in the United States and many western countries say that they hope to marry “someday.” Eighty percent of young adult men and women rate marriage as an “important” part of their life plans. Increasingly, and by dramatic percentages as compared to just 20 years ago, young adults see cohabitation as a necessary step toward marriage. They believe cohabitation as temporary emotional and sexual coupling to be an essential part of emerging adulthood.

There continues to be disagreement among researchers as to whether or not cohabitating couples are more likely to divorce (studied as the “cohabitation effect”). What is less disputed is what scholars call the “inertia hypothesis,” asserting that cohabitation creates inertia in relationships, pushing marriage indefinitely into the future. Also noted is that cohabitating couples create financial and property entanglements that cause them to slide into marriage rather than to make active decisions about the future of the relationship.

Pew researchers find that for those who have never wed, marriage remains a life goal. About six in ten men and women would eventually like to get married. The same study showed that a trip to the altar is not so appealing for those who have been married before. Among divorced or separated adults, only 29 percent say they would like to marry again, with women more likely than men to say they do not want to enter into another marriage.

### **5. Cohabitation Trends and Consequences**

Cohabitation has increased by nearly 900 percent over the last 50 years. More and more, couples are testing the waters before diving into marriage. U.S. Census data from 2012 show that 7.8 million couples are living together without having walked down the aisle, as compared to 2.9 million in 1996. And two-thirds of couples married in 2012 shared a home together for more than two years before they married.

Studies show that cohabitation is also more common among those who are less religious than their peers, among those who have been divorced, and among those who have experienced parental divorce, fatherlessness, or high levels of marital discord during childhood. A growing percentage of cohabiting-couple households — now more than 40 percent — include children.

As noted above, cohabitation prior to marriage is often hotly debated; research is unclear as to whether living together might make a couple more likely to divorce. The true variable seems to be the age at which the couple says “I do,” according to a 2013 study from the nonpartisan Council on Contemporary Families. Among the strongest predictors of divorce was the age of the two people when they entered the marriage.

Some of the current and prevalent trends for cohabitation, marriage, and the definition of family are as follows:

- The percentage of the population who are married is rapidly shrinking; in 1960, 72 percent of the adult population was married; by 2008, that percentage was 52 percent.
- Americans have an expansive definition of what constitutes “family”; only 29 percent say that the decline in so-called traditional families is a “bad thing.”
- Fifty-seven percent of Americans are accepting of cohabitation prior to marriage.
- There is widespread acceptance for premarital sex; 95 percent of all Americans have had a sexual encounter outside of marriage.
- Rates of premarital cohabitation are exploding. In 1960, just 5 percent of people lived together prior to marriage. Today that figure is 60 percent and climbing; 64 percent of cohabitating couples thought of this living arrangement as a necessary step toward marriage.
- Eighty-six percent see no problem with interracial marriage.
- Fifty-seven percent say it is okay for both gay couples and unmarried adults to raise children.
- Seventy-seven percent believe that it is easier for a married person than for a single person to raise a family.
- There is a strong belief that “to get ahead in a career,” it is better to be single.

### **6. Race, Gender, and Ethnic Differences**

Falling marriage rates and the rising average age for first marriages are consistent across nearly all racial/ethnic groups who reside in the United States, Canada, and Western Europe. Below we recount some the different ways in which marriage is perceived by major ethnic and racial groups in the United States:

*Marriage and divorce in the African-American community*

During the last several decades, the rates of marriage in the black community have declined, while the rates of divorce, separation, cohabitation, births to single moms, and children residing in female-headed households have increased. Notable trends include the following:

- In 2006, Gallup's annual "Minority Rights and Relations" survey found that 69 percent of black persons said that it is very important to marry when a man and woman plan to spend the rest of their lives together as a couple.
- African-American teens are less likely to date or to participate in serious romantic relationships than are teens from other racial/ethnic groups.
- Eighty-eight percent of African-American teens view marriage as "important"; however, only 72 percent feel well prepared for marriage.
- Churchgoing, African-American, married mothers are 31 percent more likely to report that they have excellent relationships with their husbands.
- Only 45 percent of African-American households include a married couple, compared to 80 percent of white households and 70 percent of Hispanic households (U.S. Census). Fifty percent of black persons said that it is very important to marry when a man and woman have a child together.
- African Americans are significantly less likely than other racial/ethnic groups ever to marry; are less likely to remarry; are more likely to divorce, separate, cohabit, and to bear and rear children out of wedlock (and in mother-only households).
- There is a marriage gap in the African-American community based on educational attainment. Only 28 percent of black individuals with no education are married compared to 55 percent of black persons with a college education.
- Black women divorce at a rate nearly double that of either white or Hispanic women.

*Marriage and divorce in the Hispanic and Latino community*

Marriage in the Hispanic culture is often seen in a familial context extending beyond the nucleus of the married couple. Familial relationships are even more essential to community life and identity than is the marital relationship. Being a good parent to children, and involving extended family members or close friends as trusted sources of support, are common beliefs and practices upheld by the Hispanic/Latino community, both in the United States and in Latin-American countries.

- Sixty-seven percent of Hispanic households in the United States consist of a married couple; 44 percent consist of a married couple with children under the age of 18.
- When compared to the population at large, Hispanics have higher rates of never marrying. More than one-third of Hispanic men (38 percent) and 30 percent of Hispanic women have never married.
- Thirty-five percent of all low-income married couples are Hispanic; 40 percent of all low-income married parents with children under age 6 are Hispanic.
- Researchers have found that, compared to the overall population, the divorce rates among Hispanic men and women are lower. In the general population, approximately 9 percent of men were divorced, and approximately 11 percent of women were divorced. In comparison, Hispanic men have a divorce rate of 6 percent; Hispanic women have a divorce rate of 9 percent.
- When compared to marriages involving two white non-Hispanic individuals, marriages between a Hispanic individual and a non-Hispanic individual have a similar or lower likelihood of divorce.
- Educational attainment has a positive association to divorce rates for Hispanics. Hispanics with less than a high school education are far less likely than white individuals to divorce. In contrast, Hispanics with post-high school education are more likely than white individuals to divorce. Hispanics are slightly less likely to cohabit than white persons.
- Bishops of The Episcopal Church in Latin-American countries report that the principal concern is with high teenage pregnancy rates. In the Dominican Republic, for example, 35 percent of the young mothers

giving birth are unmarried teenagers. This trend is also prevalent throughout Central America, with higher percentages reported in rural areas, again pointing to poverty and education as influential factors.

The percentage of university-educated women is increasing across Latin America and is matched by rising rates of divorce. As is true in the United States and many industrialized nations, women in Latin America delay marriage to pursue career goals and tend to be disinclined to stay in unsatisfying relationships for financial security.

#### *Marriage and divorce in the Native-American community*

- When it comes to defining marriage or family, there is much variety among Native-American tribes. Many tribes have a clan system that is actively involved in childrearing and have elders who engage in family life.
- A higher share of Native-American births is to never-married mothers (58.4 percent compared to 33.2 percent for the United States as a whole).
- Native Americans face many challenges to forming and sustaining healthy marriages. One of the greatest challenges is poverty. The proportion of Native Americans living below the poverty line is more than twice the national average. Native-American children are twice as likely to live in poverty as their non-Native counterparts. They are almost twice as likely to live in a home in which neither parent is employed.
- Native Americans are less likely than those in any other racial or ethnic group to report that they had been involved in a marriage-preparation class.
- Approximately 39 percent of the American Indian or Alaska Native population is currently married (excluding couples who are separated). The same percentage has never been married, and approximately 13 percent are divorced.
- More than half (56 percent) of Native Americans are married to individuals from other racial or ethnic groups.

#### *Marriage and divorce in the Asian-American community*

As evidenced by their high rates of marriage, Asian-American cultures generally place great value on marriage. Marriage is considered the means to building families, and families are fundamentally important to Asians. In most Asian cultures, a marital relationship is not solely a relationship between spouses, but involves the extended family as well.

- Many followers of traditional Asian cultures value interconnectedness, in contrast to the western value of independence. This difference can result in a marriage that is considered healthy by eastern standards and unhealthy or codependent by western culture.
- Romantic attachment is the primary goal in the selection of a marital partner in contemporary U.S. society. This provides a dilemma for recent immigrants whose cultural values may consider other factors as more important — for example, financial situation, family status, or ensuring the continuity of family lineage. In some Asian groups, traditional family members want to screen and make the final selection of marriage partners for their adult children.
- As a group, Asian Americans have the highest percentage of marriages (65 percent versus 61 percent for white Americans) and the lowest percentage of divorce (4 percent versus 10.5 percent for white individuals).
- Studies have shown that, in contrast to U.S. families as whole, Asian-American families tend to have lower divorce rates and to have fewer households headed by single women.
- Asian Americans have a high rate of intermarriage (that is, marriage to someone from another racial or ethnic group).
- The low rates of divorce and separation among Asian-American groups may help to account for the relatively low proportion of such families with incomes below the poverty level.

- Divorce and separation rates among native-born Asians differ little from rates of native-born white persons. However, foreign-born Asian women are less likely to be divorced or separated compared to their American-born counterparts.

#### *Marriage and divorce in other cultures and communities*

In conversation with the bishop of Taiwan, we found much similarity with many of the above trends in that diocese of The Episcopal Church. In particular, emerging trends in Taiwan include the delay of marriage for economic reasons, the increased pursuit of higher education among women, and the realities of their place in the workforce. Some indication of increased cohabitation prior to marriage is also noted.

In conversation with the bishop of Haiti, we heard that there is a definite “slowdown” in the rate of marriage among young adults, and an increasing rate of divorce among those who do marry. The common trend noted is that many young people subscribe to a “new vision of love” where pleasure and freedom are the norm, and they do not need to get married for those. An increasing number of young adults in Haiti are living together but are not married. While the practice is increasing, even outside urban centers, many people still do not approve of these “free unions.” The bishop did not note a delay in marriage for those who want to be married, but rather an increase in the number of those choosing not to marry at all. There is no legal provision for same-sex union in Haiti presently. A large part of the population is against this, believing that marriage is the union of one man and one woman.

### **7. Same-Sex Marriage**

As of mid-year 2014, a majority of Americans, 53 percent, favor allowing gay and lesbian couples to marry legally. Religious groups fall on both sides of the same-sex marriage debate: more than 8 in 10 Jewish Americans, roughly two-thirds of religiously unaffiliated Americans, 62 percent of mainline Protestants, 58 percent of white Roman Catholics, and 56 percent of Hispanic Catholics favor marriage equality for same-sex couples. By contrast, nearly 7 in 10 white evangelical Protestants and 59 percent of black Protestants oppose same-sex marriage. Hispanic Protestants are roughly split on the issue. Majorities of Americans perceive three religious groups to be unfriendly to LGBT people: the Roman Catholic Church, the Mormon Church (LDS), and evangelical Christian churches.

By generation, there is a more than 30-point gap: 7 in 10 young adults (ages 18-29) favor marriage equality, compared to 38 percent of seniors (age 65+). The gap is also geographic: 60 percent of Americans residing in the Northeast and 58 percent of those residing in the West support allowing gay and lesbian couples to marry legally. A slight majority of Midwesterners, 51 percent, support same-sex marriage, while those residing in the southern United States are split between those who support it (48 percent) and those opposed (48 percent), with a small percentage still undecided.

### **8. Marriage Equality**

In the United States, the changing opinions around same-sex marriage seem to have begun in the mid-1990s when, by legislation or by referendum, states began banning same-sex marriage, culminating with the federal Defense of Marriage Act (DOMA) in 1996 (Wisconsin banned same-sex marriage in 1979). Massachusetts's Goodridge Decision from the Supreme Judicial Court came down (4-3) in favor of marriage equality in November 2003. The court's response to the legislature's attempt to substitute civil unions was rejected in a decision released in 2004. The first marriage licenses were issued May 17, 2004. Decisions in support of marriage equality in other states followed. In June 2013, the Supreme Court of the United States, in a 5-4 decision, overturned DOMA, ruling that the federal law deprives same-sex couples of liberty without due process guaranteed by the 5th Amendment to the Constitution.

As of November 15, 2014, 33 states and the District of Columbia now allow same-sex marriage. Five states have same-sex marriage bans that have been overturned and where appeals are in process. The other states remain in some form of limbo, awaiting the outcome of appellate rulings or lawsuits. It is expected that the

Supreme Court of the United States will hear one of the appeals on its 2014-2015 docket calendar. As of late 2014, 64 percent of Americans live in states where same-sex couples may marry.

More broadly, many nations have approved freedom for same-sex couples to marry. They include the Netherlands, Belgium, Spain, Norway, Sweden, Portugal, Iceland, Denmark, Brazil, South Africa, France, New Zealand, the United Kingdom, Luxembourg, Canada, and Argentina. Nations that offer some spousal rights and protections to same-sex couples include Andorra, Austria, Australia, Columbia, Uruguay, Ecuador, Mexico, Venezuela, Croatia, Czech Republic, Slovenia, and Switzerland. Same-sex marriage has been constitutionally or legislatively banned in Honduras, El Salvador, the Dominican Republic, and Bolivia. In 81 countries around the world, including much of Africa and Asia, sexual activity by lesbian, gay, bisexual, and transgender persons remains a crime, in some cases punishable by death.

According to the Office for Congregational Development, 64.3 percent of Episcopalians (1,200,622) in 64 U.S. dioceses live in states or jurisdictions where same-sex marriage is legal, although that should not be construed to suggest that all Episcopalians living in those states support same-sex marriage.

### **9. A Word about Our Consultation with Others**

In Resolution A050, the Task Force on the Study of Marriage was asked to consult with ecumenical partners and others from around the Anglican Communion. With our budgetary and time limitations, we were able only to go so far. With the help of our church-wide staff, we gathered some resources from ecumenical partners, including the Evangelical Lutheran Church in America (ELCA), the Presbyterian Church USA, the Unitarian Universalist Association, the United Church of Christ, the Orthodox Church in America, and the U. S. Conference of Catholic Bishops (USCCB). Most of this information came to the Task Force as we were approaching publication deadlines, but it provides some useful material for the continuing work that we believe is needed in our study of changing norms and trends.

From the ELCA we received its “Social Statement on Human Sexuality: Gift and Trust,” approved by their 2009 church-wide Assembly. We also received documents related to ELCA’s consideration of same-sex relationships. However, no action with regard to this subject has been taken. ELCA remains very interested in our work.

From the Presbyterian Church USA we received two documents: 1) the official publication of their six-week study on marriage that includes biblical and confessional resources; and 2) an unofficial piece — a 2014 book by the theologian Mark Achtemeier entitled, *The Bible’s Yes to Same-Sex Marriage: An Evangelical’s Change of Heart*.

From the USCCB we received the most current document (2009) from its Marriage and Family Committee: “Life and Love in the Divine Plan.”

Our ecumenical office provided us with the 2013 Orthodox Church in America Synodal “Affirmation of the Mystery of Marriage.”

The ecumenical office also provided us with a curriculum about sexuality education and marriage adopted by the United Church of Christ and the Unitarian Universalist Association and entitled, “Our Whole Lives.”

In 2012, the Pew Research Center published a paper entitled, “Religious Groups’ Official Positions on Same-Sex Marriage”

[<http://www.pewforum.org/2012/12/07/religious-groups-official-positions-on-same-sex-marriage/>], which provides a useful summary.

Members of the Task Force also participated in the consultation on same-sex marriage convened by the Standing Commission on Liturgy and Music. This consultation included participants from many U.S. dioceses



where civil same-sex marriage is legal, as well as several ecumenical participants and participants from other parts of the Anglican Communion. A fuller report on that consultation is included in the Blue Book report of the Standing Commission on Liturgy and Music.

From the perspective of the work of the Task Force on the Study of Marriage, this consultation provide a unique opportunity to engage in face-to-face conversation about the subject of marriage and, in particular, the topic of same-sex marriage. What we heard from Episcopal, ecumenical, and Anglican-Communion participants was an appreciation for the work of The Episcopal Church and encouragement to continue the effort toward full marriage equality for all. Our ecumenical and Anglican-Communion partners were particularly interested in staying connected to our work and in the many shared resources from their own context.

**10. A Word about the Need to Continue Our Work**

As noted in this report, much of the data we were able to study focused on the contextual realities in the United States and other western countries. We were also limited in our capacity fully to research the resources of our ecumenical and Anglican-Communion partners, although we did manage to collect some important resources and information that will be useful in deepening our understanding of and engagement with these partners. Clearly, there is a need to gather more data related to the non-U.S. dioceses of The Episcopal Church, and we have asked the bishops from those dioceses to assist us in that work. Likewise, we need to continue our efforts with our ecumenical and Anglican-Communion partners. Additional resources (human and financial) will be needed to accomplish this.

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## **APPENDIX 2: Dearly Beloved: A Toolkit for the Study of Marriage**

We are pleased to offer to The Episcopal Church a resource for study and discussion about marriage. This topic is of historic and timeless significance for the Church. Practices of marriage are undergoing social change in our own day, and our Church, acting through General Convention in 2012, asked that we develop tools for discussion on this subject.

So it is a time for us to reflect about and communicate our understanding of marriage. We do so — as we always do when discerning our way forward — by considering those three sources of Anglican authority on the subject: scripture, tradition (including theology, liturgy, canon law, and history), and reason (including our human experience).

We are 12 appointees: bishops, theologians, educators, and pastors. As the Task Force that was charged with providing resources for this reflection, we have deeply explored marriage through the lenses of scripture, tradition, and reason. We are eager to invite the Church into discussion at the local level.

Our hope is that you will take advantage of this moment in our history to be a part of discerning our way forward. In our day, what is God calling us to understand, to say, and perhaps to do in regard to marriage?

We offer three different formats for engaging your community of faith in this process, in the hope that you will find one that fits your circumstances. Your involvement is critical, so that this becomes a church-wide conversation about this timely and important subject that affects our personal lives, our families, and our communities.

In Christ,  
The Rev. Brian C. Taylor, Chair  
Task Force on the Study of Marriage

## **Dearlly Beloved: A Toolkit for the Study of Marriage**

Welcome to the toolkit of resources for the study of marriage. These resources have been created by the Task Force on the Study of Marriage established by the 2012 General Convention of The Episcopal Church in response to the charge “to identify and explore biblical, theological, historical, liturgical, and canonical dimensions of marriage.” In this toolkit you will find:

### Overview of the Task Force and the Work

- Text of Resolution A050
- Purpose of this toolkit
- Who should use this toolkit
- How to use this toolkit
- The role of the bishop and the diocese
- The role of the clergy and laity
- Publicizing your forums or event
- Send us your input

### FORMAT 1 — CARRY-ON CONVERSATIONS

- Facilitator Guides
- Handout Sheets
  - Our Experience of Grace in Relationship
  - Historical Considerations and Questions
  - Changing Norms in Contemporary Context
  - Biblical and Theological Considerations and Questions

### FORMAT 2 — FORUMS

- What Makes a Marriage Christian?
- Marriage and Culture
- Marriage and the Bible: A Bible Study
- History of a Liturgical Fragment

### FORMAT 3 — STUDY GROUPS

- Discussion questions

**Overview of the Task Force and the Work**

At the 77th General Convention of The Episcopal Church in 2012, the Standing Commission on Liturgy and Music submitted a resolution calling for a task force on the Study of Marriage. Their Resolution A050 (text below) included the following explanation:

*As the Standing Commission on Liturgy and Music developed liturgical resources for blessing same-sex relationships, it faced repeated questions about marriage. What makes a marriage Christian? What is the relationship between the Church's blessing of a relationship, whether different-sex or same-sex, and a union, "marriage" or otherwise, created by civil law? Is the blessing of a same-sex relationship equivalent to the marriage of a different-sex couple, and if so, should this liturgy be called "marriage"? Because the Church's understanding of marriage affects so many of its members, the Commission believes it is important to engage in a church-wide conversation about our theology of marriage.*

The resolution called for a task force on the Study of Marriage to be appointed by the Presiding Bishop, Katharine Jefferts Schori, and by the President of the House of Deputies, The Rev. Gay Clark Jennings, to study and consult broadly on the subject of marriage. They were asked to explore historical, biblical, theological, liturgical, and canonical dimensions of marriage, and to do so in consideration of the "changing societal and cultural norms and legal structures" of our time.

The members of the Task Force on the Study of Marriage are:

The Rev. Brian C. Taylor, *Chair*, Diocese of the Rio Grande  
Ms. Joan Geiszler-Ludlum, *Vice Chair*, Diocese of East Carolina  
The Rev. Tobias Stanislas Haller BSG, *Secretary*, Diocese of New York  
Ms. Carolyn M. Chilton, Diocese of Virginia  
The Rt. Rev. Thomas C. Ely, Diocese of Vermont  
The Very Rev. Gail Greenwell, Diocese of Southern Ohio  
The Rev. J. David Knight, Diocese of Mississippi  
The Rev. Canon W. (Will) H. Mebane, Jr., Diocese of Western New York  
The Rev. Dr. Cameron E. Partridge, Diocese of Massachusetts  
The Rev. Canon Susan Russell, Diocese of Los Angeles  
The Very Rev. Dr. Sylvia A. Sweeney, Diocese of Los Angeles  
The Rt. Rev. W. Andrew Waldo, Diocese of Upper South Carolina

"This task force is charged not only to take the pulse of our current theological understanding of the meaning of marriage, but to assist the faithful in conversation and discernment about marriage, in particular what the church might hold up as 'holy example' of the love between Christ and his church," noted House of Deputies President, The Rev. Gay Jennings when announcing the appointment of the task force.

The Episcopal Church's theology and practice of marriage has changed significantly over the centuries, and we need to understand more clearly what we as a church mean when we use that word."

**Text of Resolution A050**

Task Force on the Study of Marriage 2012 General Convention of The Episcopal Church

*Resolved*, the House of Deputies concurring, That the 77th General Convention direct the Presiding Bishop and President of the House of Deputies to appoint a task force of not more than 12 people, consisting of theologians, liturgists, pastors, and educators, to identify and explore biblical, theological, historical, liturgical, and canonical dimensions of marriage; and be it further,

*Resolved*, That the task force consult with the Standing Commission on Constitution and Canons and with The Standing Commission on Liturgy and Music to address the pastoral need for priests to officiate at a civil marriage of a same-sex couple in states that authorize such; and be it further

*Resolved*, That the Task Force consult with couples living in marriage and in other lifelong committed relationships and with single adults; and be it further

*Resolved*, That the Task Force consult with other churches in the Anglican Communion and with our ecumenical partners; and be it further

*Resolved*, That the Task Force consider issues raised by changing societal and cultural norms and legal structures, including legislation authorizing or forbidding marriage, civil unions, or domestic partnerships between two people of the same sex, in the U.S. and other countries where The Episcopal Church is located; and be it further

*Resolved*, That the Task Force develop tools for theological reflection and norms for theological discussion at a local level; and be it further

*Resolved*, That the Task Force report its progress to the 78th General Convention; and be it further

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

EXPLANATION

As the Standing Commission on Liturgy and Music developed liturgical resources for blessing same-gender relationships, it faced repeated questions about marriage. What makes a marriage Christian? What is the relationship between the Church’s blessing of a relationship, whether different-gender or same-gender, and a union, “marriage” or otherwise, created by civil law? Is the blessing of a same-gender relationship equivalent to the marriage of a different-gender couple, and if so, should this liturgy be called “marriage”? Because the Church’s understanding of marriage affects so many of its members, the Commission believes it is important to engage in a church-wide conversation about our theology of marriage. The Dioceses of El Camino Real and North Carolina have both recently undertaken studies of marriage, with reports available from the Digital Archives.

**Purpose of this toolkit:**

The purpose of this toolkit is to help The Episcopal Church and its people discuss and study what we mean by marriage. What does it mean to be married? What does the Church have to say about marriage? What makes a marriage Christian? What is the role of the Church in marriage? In a rapidly changing culture in the United States, what values does the Church hold as indispensable to marriage? How can the Church continue to speak to people about relationships, faithfulness and life in Christ? And how does marriage serve as an icon of the love of Christ not just to the couple but to their larger communities?

These questions, and many more, are at the heart of the conversations around the Church on marriage. This toolkit is designed to promote and facilitate your conversations so that together — as the Body of Christ — we can be witnesses to Christ’s love for each other, for the Church and for the world.

**Who should use this toolkit?**

These resources are designed for study groups, large and small, for adults and teenagers in the Church and in the wider communities around your Church. Suggestions include provincial and diocesan meetings; deanery clericus meetings and diocesan clergy conferences; Sunday morning congregational education offerings or special evening or Saturday classes. They can be used as one-time events with groups already in existence, such as Education for Ministry (EfM) groups, other Bible study classes, men’s and women’s groups, Episcopal Church Women (ECW), youth groups, young adult classes, or in partnership with a neighboring Episcopal Church or ecumenical partner.

Many of life’s richest experiences come in conversation and fellowship with people from all walks of life. For these classes and groups, intentionally including as diverse a group of participants — people of different ages, races, cultures, genders, sexualities, marital/partnered status, cohabiting couples and singles (including, where possible, those who feel a special vocation to the single life) — is strongly encouraged.

**How to use this toolkit:**

The resources in this toolkit have been organized in three suggested formats:

*Format 1: Carry-On Conversations:* This discussion format offers two design options: a 90-minute evening or Saturday program, or three 35-minute sessions.

*Format 2: Forums:* This format provides resources for four 45-minute forums designed for use on the typical Sunday morning Christian Formation format or with existing groups (such as ongoing small groups or EfM groups.) Any or all of them can be used as part of a series of classes or meetings; or as one-time, stand-alone classes.

*Format 3: Study Groups:* This format is intended for those who would like to “go deeper.” It provides reflection questions for a study group that reads some or all of the seven essays on marriage included in Appendix 1 in the Report to the 2015 General Convention of the Task Force on the Study of Marriage.

Whichever format you choose, we recommend appointing both a group facilitator and a scribe.

**The role of the facilitator is to:**

- Create a welcoming, safe, and comfortable environment of dialogue, not debate.
- Talk as little as possible. The facilitator is not there to lecture, argue, rebut, revise, or otherwise to get in the way of people expressing their questions and feelings.
- Encourage conversation.
- Manage the conversation so that everyone has a chance to contribute. This includes inviting the introverts to speak, and inviting the extroverts to listen to others.

**The role of the scribe is to:**

- Provide notes — whenever possible, on newsprint or a whiteboard so that the full group can see what is being recorded.
- Free up the facilitator to focus on the people and the conversation.

**The role of the bishop and the diocese:**

Bishops, among their other roles, are the chief teachers of the Church and their diocese. This is particularly true when the bishops meet together as the House of Bishops. The role of chief teacher and pastor includes the encouragement and advancement of opportunities for study and conversation on topics of particular importance to the Church and the world, including marriage.

**The Task Force asks bishops across the Church to:**

- Publicize and encourage the use of this toolkit throughout their diocese.
- Offer classes and discussion groups themselves as part of their parish visitations, conferences and retreats, and on their own staffs.
- Provide for the study of these materials with their General Convention deputation, with the clergy in their dioceses and at provincial meetings.
- Engage with their peers in studying and discussing these materials in preparation for the 2015 General Convention.
- Encourage diversity in groups.
- Be prayerful about the role of the Church in this area, and encourage others to follow their example.

**The role of the clergy and laity:**

The clergy, among their other roles, are teachers and pastors in their particular churches. Like bishops, this includes the encouragement and advancement of opportunities for study and conversation on topics of particular importance to the Church and the world, including marriage. Members of the laity, like bishops, priests, and deacons, are called to represent Christ to the world. They bring to this important conversation the breadth and depth of their own experience of marriage — their own and/or those they've experienced in the context of relationship with family, friends, neighbors, and colleagues.

**The Task Force asks clergy and laity across the Church to:**

- Publicize and encourage the use of this toolkit in congregations and communities.
- For clergy in particular, we ask you to lead by example in supporting and providing contexts for the congregational use of these resources.
- For the laity in particular, we ask you to urge your clergy and lay leaders — diocesan and congregational — to utilize these resources.
- Be open and welcoming to different points of view.
- Encourage diversity by intentionally inviting and including a broad spectrum of participants.
- Be prayerful about the role of the Church in this area and encourage others to follow your example.

**Publicizing your forums or event:**

- Three to four weeks prior to your event, advertise it to your congregation by bulletin announcements, verbal announcements, website, and social media (by creating a Facebook event, for example)
- Send a press release to your local newspapers and your diocese.
- Send an invitation to nearby congregations, and reach out to ecumenical partners.
- Send an email or letter of invitation to selected people in your congregation —remember to invite a diverse group of people.
- Send an invitation to other groups in your church asking if you can offer this study with them.

**Send us your input:**

Even though the initial work of the Task Force on the Study of Marriage has been completed in its report to the 2015 General Convention, the Task Force's members have requested that their work continue in the 2015-2018 triennium. In order to help them understand how the Church is receiving their work and to thereby give input to further study and reporting, it is essential for them to hear from those who have conversations on marriage based upon this toolkit.

After your session(s), write a one-page summary of your experience and of how you would advise the Task Force to continue its work. Then email it to the Chair, The Rev. Brian C. Taylor, at [bctaylor@me.com](mailto:bctaylor@me.com). Thank you for your help!



**FORMAT 1: Carry-On Conversations****Introduction**

This format offers an outline for a 90-minute discussion group designed to be used as an evening or Saturday program — perhaps including a light meal or other refreshment. Alternatively, it can be divided into three 35-minute sessions held at different times. In addition to the designs for the two different approaches, a one-page handout for each topic is provided, along with a facilitator’s guide, suggestions for ways to invite participation, and a form for reporting on your event.

We have also provided a separate PowerPoint presentation that walks you through the various components and provides some visuals that may be useful to you as you make use of this resource.

Until the summer of 2015, the PowerPoint will be available at the General Convention website for the Task Force on the Study of Marriage: <http://www.generalconvention.org/ccab>

- Then, under “Find CCABs ...,” click on “Choose a category”;
- Choose “Task Force of General Convention”;
- Click on “Task Force on the Study of Marriage”;
- Click on “Documents”; and
- Click on the downloadable “Study of Marriage Task Force PowerPoint Presentation for Carry-on Conversation.”

After the summer of 2015, this Power Point will be removed from the General Convention website and can be obtained by contacting the Chair of the Task Force, Brian C. Taylor, at the email address, [bctaylor@me.com](mailto:bctaylor@me.com)

**Design Principles**

This “carry-on” is designed for:

- Conversations that feature participation, engagement, and collaboration;
- A process that is open, welcoming, upbeat, stimulating, and flexible enough for a variety of settings, group sizes, and demographics.

**Invitation Strategy**

- Try to involve people who offer divergent points of view about marriage;
- Try to involve people who are single, newly married, married for a long time, in other partnered relationships, divorced, widowed, etc.;
- Try to involve people who are currently active in the Church, those who are less active, and those who have little or no affiliation with the Church; and
- Offer to do sessions for groups that are already meeting for another purpose.

**Invitation Sample**

Dear (Friend, Colleague, Church Member, etc.):

We invite you to participate in a church-wide conversation about marriage: its history, biblical and theological dimensions, and changing trends. In 2012, General Convention created a task force that has developed resources for this purpose. Using these resources, we are holding a 90-minute session (or three 35-minute sessions) on (day and date) at (time) at (location). We would be pleased if you could join us in this important conversation. Please let us know if you are interested and are available to participate.

- WHO: Everyone and anyone who is interested in marriage and the future shape of marriage;
- WHY: In 2012, The General Convention of The Episcopal Church created a task force to study marriage. Members of the Task Force are encouraging conversations about marriage throughout our Church. We invite you to participate in a conversation about the history of marriage, its biblical and theological dimensions, and changing norms and current trends.
- WHEN: \_\_\_\_\_ WHERE: \_\_\_\_\_

***The Facilitator's Role***

- Create a comfortable, welcoming environment.
- Encourage participation by all present.
- Explain the purpose of the event and time constraints.
- Outline the structure for the event and distribute materials.
- Avoid any temptation to lecture, explain, argue, rebut, revise, or otherwise get in the way of allowing people to express themselves. We want to hear from them!
- Consider appointing someone to record key responses from participants.

***Designs (two options)***

***One 90-Minute Session***

- Welcome, Prayer, and Overview
- One-Minute Story of a Relationship in Which You Have Seen the Image of God
- History of Marriage
- Changing Norms and Trends
- Biblical and Theological Dimensions
- Thank You and Closing Prayer

***Three 35-Minute Sessions***

- Welcome, Prayer, and Overview (each session)
- One-Minute Story of a Relationship in Which You Have Seen the Image of God (each session)
- Session One – History of Marriage
- Session Two – Changing Norms and Trends
- Session Three – Biblical and Theological Dimensions
- Thank You and Closing Prayer (each session)

**Facilitator Guides**

**“Carry-On Conversation” Facilitator Guide for 90-Minute Session**

Module	90-Minute Design (Suggested times are flexible.)
<p>WELCOME &amp; OVERVIEW 5 minutes</p>	<ul style="list-style-type: none"> <li>• Gathering and introductions</li> <li>• Prayer for Guidance – #57 or #58 BCP page 832</li> <li>• Overview and context for this conversation</li> <li>• Hand out packets with three one-page summary documents for use during the session</li> </ul>
<p>STORIES OF RELATIONSHIPS 5-10 minutes</p>	<ul style="list-style-type: none"> <li>• Guided by principles laid out in General Convention Resolution D039-2000, which names values that the Church upholds for its members in relationships: "fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God:"</li> </ul> <p>— Tell a one-minute story about your relationship or one you know well in which you have seen the image of God (in groups of three)</p> <p>— Invite people to record and send one-minute video to <a href="mailto:taskforceonmarriage@gmail.com">taskforceonmarriage@gmail.com</a> AND/OR post written response to: <a href="http://www.facebook.com/A050taskforce">www.facebook.com/A050taskforce</a></p>
<p>HISTORY OF MARRIAGE 20-25 minutes</p>	<ul style="list-style-type: none"> <li>• Use one-page summary of the key aspects regarding the history of marriage (pg 17).</li> <li>• Conversation and sharing of responses to these questions: (large group)</li> </ul> <p>QUESTIONS:</p> <p>— What did you find surprising/affirming/unsettling about this historical synopsis?</p> <p>— How does this history help inform our contemporary understanding of marriage? (Record key responses.)</p>
<p>CHANGING NORMS &amp; TRENDS 20-25 minutes</p>	<ul style="list-style-type: none"> <li>• Use one-page summary of key trends and changes in norms vis-à-vis marriage (pg 18).</li> <li>• Conversation and sharing of responses (in small groups or 5-6)</li> </ul> <p>QUESTION: How might these trends, and others of which you are aware, influence how the Church understands marriage?</p>
<p>BIBLICAL &amp; THEOLOGICAL DIMENSIONS 20-25 minutes</p>	<ul style="list-style-type: none"> <li>• Use one-page summary of key biblical and theological themes or issues regarding how the Church understands marriage (pg 19).</li> </ul> <p>QUESTION: Which of these themes is most central to your understanding of Christian marriage? (small groups of 5-6)</p>
<p>THANKS &amp; PRAYER 5 minutes</p>	<p>Thank You</p> <p>Closing prayer: Lord’s Prayer or one chosen by facilitator</p>

**“Carry-on Conversation” Facilitator Guide for Three 35-Minute Sessions**

<b>Module</b>	<b>Three 35-Minute Sessions Design (Adjust times to fit your needs.)</b>
<p>WELCOME &amp; OVERVIEW 5 minutes</p>	<p>Each time you gather, begin with:</p> <ul style="list-style-type: none"> <li>• Gathering and introductions</li> <li>• Prayer for Guidance – #57 or #58 BCP page 832</li> <li>• Overview and context for this conversation</li> </ul>
<p>STORIES OF RELATIONSHIPS 5-10 minutes</p>	<p>Each time you gather, begin with this exercise:</p> <ul style="list-style-type: none"> <li>• Guided by principles laid out in General Convention Resolution D039-2000, which names values that the Church upholds for its members in relationships: "fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God:"</li> </ul> <p>— Tell a one-minute story about your relationship or one you know well in which you have seen the image of God (in groups of three)</p> <p>— Invite people to record and send one-minute video to <a href="mailto:taskforceonmarriage@gmail.com">taskforceonmarriage@gmail.com</a> AND/OR post written response to: <a href="http://www.facebook.com/A050taskforce">www.facebook.com/A050taskforce</a></p>
<p><b>Session One</b> HISTORY OF MARRIAGE 20-25 minutes</p>	<ul style="list-style-type: none"> <li>• Use one-page summary of the key aspects regarding the history of marriage (pg 17).</li> <li>• Conversation and sharing of responses to these questions: (large group)</li> </ul> <p>QUESTIONS:</p> <p>— What did you find surprising/affirming/unsettling about this historical synopsis?</p> <p>— How does this history help inform our contemporary understanding of marriage? (Record key responses.)</p>
<p><b>Session Two</b> CHANGING NORMS &amp; TRENDS 20-25 minutes</p>	<ul style="list-style-type: none"> <li>• Use one-page summary of key trends and changes in norms vis-à-vis marriage (pg 18).</li> <li>• Conversation and sharing of responses (in small groups or 5-6)</li> </ul> <p>QUESTION: How might these trends, and others of which you are aware, influence how the Church understands marriage?</p>
<p><b>Session Three</b> BIBLICAL &amp; THEOLOGICAL DIMENSIONS 20-25 minutes</p>	<ul style="list-style-type: none"> <li>• Use one-page summary of key biblical and theological themes or issues regarding how the Church understands marriage (pg 19).</li> </ul> <p>QUESTION: Which of these themes is most central to your understanding of Christian marriage? (small groups of 5-6)</p>
<p>THANKS &amp; PRAYER 5 minutes</p>	<p>Do this for each session:</p> <p>Thank You</p> <p>Closing prayer: Lord’s Prayer or one chosen by facilitator</p>

**Handout 1: Our Experience of Grace in Relationship**

Guided by principles laid out in General Convention Resolution D039-2000, which names values that the Church upholds for its members in relationships: “fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God...”

Break participants into groups of two or three for the purpose of telling a one minute story about their relationship — or one they know well — in which they have seen the image of God. There is no need for the triads to report back to the larger group.

## Handout 2: Historical Considerations and Questions

The following considerations and questions are designed to offer an opportunity to explore together the history of marriage and reflect together on the questions it raises. Depending on the size of the group, conversations can happen in groups of two or three, in larger break-out groups, or with the whole assembly.

a. Among the several patterns we see repeated in history in regard to marriage, one essential element of marriage that almost always occurred was a process of betrothal.

*Question: What happens during a betrothal process to the couple and to the rest of the kinship and community network? Does contemporary Episcopal practice give due respect to the ancient practice of betrothal? Does this practice still have relevance in our contemporary understanding of marriage?*

b. Different historical periods interpreted the marriage ritual in different ways. Eastern and Teutonic cultures believing that the marriage rite dramatically changed and blessed both the husband and the wife, while Romans believing that the wedding day was in fact the bride's day.

*Question: How do we still see this ancient question being played out in contemporary marriage practices? How does the concept of same-sex marriage further inform this ancient divergence of viewpoints?*

c. For much of history, the expectation and necessity of formal, legal marriage was one left to those with power, status, and property. In our own day, we do not believe that economic or social status should have any impact on people's right to marry.

*Question: How does this change in the Christian understanding of who can marry change our contemporary understanding of the nature and purposes of marriage?*

d. Throughout history, access to legal marriage has been closely related to the right to give consent – a right directly related to one's ability to act and choose autonomously. Only those with the right to act autonomously could exercise the right to choose marriage. Often this has meant that those who were oppressed and subordinated in a patriarchal and colonial context could not decide their own lives. Access to marriage became a means of controlling the powerless in a society.

*Question: Are there situations in contemporary society in which access to marriage is still being controlled by the powerful and privileged to the detriment of those with less power?*

e. In much of the history of marriage, the decision to cohabitate without the legal sanction of civil and religious authorities was a means of expressing suspicion and distrust for the institutions of the church and the state, choosing less formalized models of authority and validity.

*Question: Is this still one of the reasons that so many couples in The Episcopal Church choose to cohabit rather than to marry today, or are there new reasons and rationales for cohabitation?*

f. Since at least the time of Augustine, at various periods in history marriage has been understood as a sacramental rite. While The Episcopal Church acknowledges only two primary sacraments instituted by Christ (Baptism and Eucharist), The Episcopal Church also gives special honor to marriage as one of the historically recognized sacramental rites of the Church.

*Question: Who is the primary actor in a sacramental rite, the Christian(s) or God?*

### Handout 3: Changing Norms in Contemporary Context

The cultural landscape continues to shift around many aspects of the institution of marriage — a shift evidenced by the statistics represented in the following data points illustrating examples of changing norms. Share these data points with participants and then discuss using the questions below.

1. Marriage as a precursor to childbirth is seen as a relic of the past by many young adults. From “Knot Yet: The National Marriage Project,” University of Virginia, 2011
2. In previous generations, marriage was seen as a cornerstone of launching into adulthood. Today, young adults are delaying marriage due to financial insecurity, fear of divorce, and a desire for career stability. *Ibid.*
3. Ninety percent of young adults feel they must be completely financially independent before they marry. *Ibid.*
4. The cohabitation rate of unmarried senior citizens is rising: up 50 percent since 2000. *Ibid.*
5. Sixty-five percent of all couples who eventually marry lived together before marriage. from Pew Research Study: “The Decline of Marriage and Rise of New Families,” 2010.
6. The vast majority of adults in their twenties (80 percent) see marriage as an “important part of their life plan.” “Knot Yet,” University of Virginia.
7. The “ideal” for marriage has shifted from providing economic security to finding a “soul mate” — often with idealistic and unmet expectations. *Ibid.*
8. Marriage remains the norm for adults with a college education and good incomes; markedly less prevalent for those with less education or economic stability. *Ibid.*
9. In the past 7 years, 35-40 percent of all marriages began with on-line dating. “Emerging Adulthood: The Winding Road from Late Teens through the Twenties,” Jeffrey Arnett; Oxford.
10. As of June 2014, 31 states prohibit same-sex marriage, 20 states and the District of Columbia allow same-sex marriage, and 47 percent of Episcopalians in 40 dioceses live in states or jurisdictions where same-sex marriage is legal. Office for Congregational Research, DFMS.
11. Two-thirds of all adults see living together as a necessary step to marriage. Cohabitation has become a routine substitute for marriage. Pew Research Study.
12. In 1960, two-thirds of all adults in their twenties were married. By 2008, that number was only 26 percent. *Ibid.*
13. Divorce rates leveled off in the US in 1980 to 45 percent of all marriages and has held steady for the past 35 years. For senior adults, the divorce rate has jumped 35 percent. “The All Or Nothing Marriage,” Eli J. Finkel, a Professor of Psychology at Northwestern University, published in the *New York Times*, 2014.

#### Discussion Questions:

- The changing norms around marriage may challenge the way some of us have experienced dating and marriage. How does your experience differ or align with these current trends?
- Are there trends that strike you as impacting the institution of marriage positively? Others negatively?
- Discuss the impact of larger societal issues reflected in these statistics (i.e. feminism; civil rights; marriage equality and economic justice movements).
- Given the influence of social media on the changing landscape of human interaction, how do you understand its impact on courtship and marriage?
- What opportunities or challenges do you believe these trends will represent for the Church in our care and concern for all human relationships?



#### **Handout 4: Biblical and Theological Considerations and Questions**

Each set of passages below — from the Celebration and Blessing of a Marriage and from Scripture passages assigned for use in that celebration — highlights a key theme or themes inherent in the Church’s understanding of marriage. In small groups, take five minutes for each set, read through and savor the texts, and then reflect on the questions after each set of passages.

*“...intended by God for their mutual joy ... to love and to cherish, until we are parted by death.” (BCP 423, 427) “... for love is strong as death ...” (Song of Solomon 8:6) “As the Father has loved me, so I have loved you; abide in my love.” (John 15:9) “[Love] bears all things, believes all things, hopes all things, endures all things. Love never ends.” (1 Corinthians 13:7-8)*

How have you experienced the love of God in your life? In your relationships? What does it mean to “abide in love?” What helps you to do so?

*“Established by God in creation ...” (BCP 423) “... not good that the man should be alone.” (Genesis 2:18)*

What does it mean to be “alone”? What do these passages say to a newlywed couple? To a widow or widower? To a single person who feels called to a single life?

*“intended by God ... for the help and comfort given one another in prosperity and adversity ... faithful ... as long as you both shall live ... to have and to hold from this day forward, for better for worse, for richer for poorer, in sickness and in health” (BCP 423, 424, 427) “live in love, as Christ loved us and gave himself up for us ... Be subject to one another out of reverence for Christ.” (Ephesians 5:2,21)*

How have you experienced love in difficult times as well as happy times? How is mutual love played out in your life and in the lives of those you know?

## **FORMAT 2: Forums**

This format provides resources for four 45-minute forums designed for use in a typical Sunday morning Christian Formation format or with existing groups (such as ongoing small groups or EfM groups.) Any or all of these sessions can be used as part of a series of classes or meetings or as one-time, stand-alone classes. Each handout is one or two pages long for easy distribution.

You may want to begin each session with the “Stories of Relationships” exercise described in Carry-On Conversations. This is not only a good ice-breaker, but also a way to help focus the conversation.

The first two resources follow the Describe/Listen/Reflect format and provide an opportunity to engage with the questions of what makes a marriage Christian, and the relationship between culture and marriage. The third resource is a Bible study on the passage from Ephesians that is the source for one of the dominant images in Christian marriage as a metaphor for the relationship between Christ and the Church. The final resource in this section offers an opportunity to examine the text of the opening to the marriage liturgy in the Anglican tradition.

## FORUM 1: What Makes a Marriage Christian?

### Describe

Many people get married in the courts with no religious ceremony. Vows of commitment are an integral part of civil and religious marriages. For those seeking God's blessing through ritual marriage in the Church, marriage rites also articulate values and obligations rooted in scripture and tradition. For example, The Blessing of a Civil Marriage (BCP 433) includes this charge to the couple:

*N. and N., you have come here today to seek the blessing of God and the Church upon your marriage. I require, therefore, that you promise, with the help of God, to fulfill the obligations which Christian marriage demand.*

The Celebration and Blessing of a Marriage (BCP, 423), declares that the covenant of marriage represents "the spiritual unity between Christ and his Church." It asks God to so bless "these your servants, that they may so love, honor, and cherish each other in faithfulness and patience, in wisdom and true godliness, that their home may be a haven of blessing and peace."

### Listen

Using the questions below, discover what others in your group understand and experience with regard to the obligations of marriage.

- Why seek the blessing of God? Why seek the blessing of the Church? Is one OK without the other? What power (importance) is in such blessings? How does the blessing impact a marriage?
- How have you seen married couples fulfill these obligations?
- How have you witnessed this in other relationships?

### Reflect

As you end this time together, consider what you will take away from listening to others' understandings of marriage.

- What have you heard today that especially made you think?
- What is one thing you'll do differently in the next week as a result of this reflection?
- In what aspect of this conversation will you seek God's guidance through prayer?

**FORUM 2: Marriage and Culture****Describe**

The institution of marriage has been shifting throughout history and continues to shift in our culture. Since the 1980s, 45 percent of marriages end in divorce; children of divorced parents often delay marriage or may be reluctant to get married; people frequently cohabit prior to or instead of marrying; and marriage equality is becoming increasingly common.

Individuals respond to these shifts in a variety of ways. Within our Church, some seek to reclaim and reassert what they understand to be a traditional view of marriage. Others in our Church seek to address these issues by revising its practices, including its liturgies.

**Listen**

Using the questions below, discover what others in your community understand and experience with regard to these cultural shifts.

- What did previous generations of your family (e.g., grandparents, parents) teach you about marriage? How did they define marriage? What examples of marriage did they set?
- What shifts in marriage are you seeing in your community?
- What do you see as the benefits to marriage, if any? To marriage blessed by the Church?

**Reflect**

As you end this time together, consider what you will take away from listening to others' understandings of marriage.

- What have you heard today that especially made you think?
- What is one thing you'll do differently in the next week as a result of this reflection?
- In what aspect of this conversation will you seek God's guidance through prayer?

**FORUM 3: Marriage and the Bible: A Bible Study**

The following passage (Ephesians 5:1-2, 21-33, NRSV) is commended for use as a reading in the BCP “Celebration and Blessing of a Marriage.”

*Therefore be imitators of God, as beloved children,<sup>20</sup> and live in love, as Christ loved us and gave himself up for us, a fragrant offering and sacrifice to God.<sup>21</sup> Be subject to one another out of reverence for Christ.<sup>22</sup> Wives, be subject to your husbands as you are to the Lord.<sup>23</sup> For the husband is the head of the wife just as Christ is the head of the church, the body of which he is the Savior.<sup>24</sup> Just as the church is subject to Christ, so also wives ought to be, in everything, to their husbands.<sup>25</sup> Husbands, love your wives, just as Christ loved the church and gave himself up for her,<sup>26</sup> in order to make her holy by cleansing her with the washing of water by the word,<sup>27</sup> so as to present the church to himself in splendor, without a spot or wrinkle or anything of the kind — yes, so that she may be holy and without blemish.<sup>28</sup> In the same way, husbands should love their wives as they do their own bodies. He who loves his wife loves himself.<sup>29</sup> For no one ever hates his own body, but he nourishes and tenderly cares for it, just as Christ does for the church,<sup>30</sup> because we are members of his body.<sup>31</sup> “For this reason a man will leave his father and mother and be joined to his wife, and the two will become one flesh.”<sup>32</sup> This is a great mystery, and I am applying it to Christ and the church.<sup>33</sup> Each of you, however, should love his wife as himself, and a wife should respect her husband.*

**Reflection questions**

- In the 1928 revision of the marriage rite, The Episcopal Church removed the wife’s vow to “obey” her husband. How do you feel about this in relation to the biblical text? Is this a text you would want read or did have read at your own marriage? Why or why not?
- Verse 24 calls on wives to be “subject ... to their husbands” “just as the Church is subject to Christ.” How is the Church “subject” to Christ? As one’s body is to one’s head (vs 23)? What does that mean?
- How is mutual obedience (vs. 21, “Be subject to one another”) expressed in this passage? How do you understand it in your own relationship or marriage?
- The author sets up an analogy between Christ or Church and the organic Head or Body. In keeping with 1 Corinthians 12 (especially v 21: “The eye cannot say to the hand, ‘I have no need of you,’ nor again the head to the feet, ‘I have no need of you.’ ”) What does this concept of organic unity say to you about marriage? Is the head of the body separate from the body?
- Verses 28-29 describe the wife as identical to the husband’s own body, on the analogy of Christ and his Body, the Church. What, if anything, does this say to you about gender in relation to the body?
- To what extent do you see verse 33 as an echo of Leviticus 19:18 (“... love your neighbor as yourself...”) included by Jesus in his Summary of the Law?
- Under Roman custom and law, the father of a family had almost unlimited authority over that family (*patria potestas*). In what way does a call for mutual submission and a husband’s responsibility to love his wife in a sacrificial and tender way represent a movement away from that patriarchal model?

#### **FORUM 4: History of a Liturgical Fragment**

This forum offers a comparison of the opening of the marriage liturgy in historical contexts dating from the Medieval English rite of Salisbury (Sarum) up through the 1979 BCP.

Perhaps the most striking feature of the Sarum rite is the location: the couple stands with the minister for most of the liturgy at the entrance to the Church, entering it for the mass that follows and forming a part of the marriage rite. Note, however, that even our present BCP includes the option of celebrating marriage in a place other than a church.

As you compare the evolution of the marriage rite in the English/Anglican/Episcopal tradition, you'll note that the changes (both in terms of content and ordering) have been substantial, reflecting different attitudes and the prevailing "style" of liturgy.

One important feature of the marriage rites used in The Episcopal Church from its beginnings until the 1979 revision is the omission of the language about the "causes" or reasons for which marriage was said to have been instituted or established by God.

Note also the reordering of these reasons as well as the change in the sequence of references to creation, the metaphorical application of marriage to Christ and the Church, and the wedding at Cana.

#### **Questions to consider**

- What does the location of marriage "in the Church," as opposed to at its entrance, "in some proper house," or "another appropriate place" say to you?
- Would you feel your own marriage to be different if the location had been or were different?
- Does this say anything about the Church being used as a "venue" by people with little church connection? Or about any distinction between the sacred and the civil nature of marriage?
- What significance, if any, do you see in the reordering of the "causes" or reasons for marriage in the 1979 BCP? What about their absence from the marriage liturgy used in The Episcopal Church for almost 200 years (1789-1979)?

Sarum (tr. Hoskin)*	1662 BCP	BCP 1789/90	BCP 1892	BCP 1928	BCP 1979
<p><i>... the man and woman shall stand before the entrance of the church ...</i></p> <p>Behold, brethren, we have come hither in the sight of God, the angels, and all his saints in the presence of the church,</p> <p>to join together two bodies, of this man and of this woman,</p> <p><i>[at the altar during the mass:</i></p> <p><i>... when the beginnings of the universe were laid down...</i></p> <p><i>... so excellent a mystery, that thou signifyest the sacrament of Christ and the Church ...]</i></p> <p><i>[at the blessing after mass:</i></p> <p><i>... the six water jugs in Cana of Galilee ...]</i></p>	<p><i>... the persons to be married shall come into the body of the church ...</i></p> <p>DEARLY beloved, we are gathered together here in the sight of God, and in the face of this congregation, to join together</p> <p>this Man and this Woman in holy Matrimony; which is an honourable estate,</p> <p>instituted of God in the time of man's innocency, signifying unto us the mystical union that is betwixt Christ and his Church;</p> <p>which holy estate Christ adorned and beautified with his presence, and first miracle that he wrought, in Cana of Galilee; and is commended of Saint Paul to be honourable among all men: and therefore is not by any to be enterprised, nor taken in hand, unadvisedly, lightly, or wantonly, to satisfy men's carnal lusts and appetites, like brute beasts that have no understanding; but reverently, discreetly, advisedly, soberly, and in the fear of God;</p>	<p><i>... the Persons to be married shall come into the Body of the church, or shall be ready in some proper house ...</i></p> <p>DEARLY beloved, we are gathered together here in the sight of God, and in the face of this</p> <p>company, to join together</p> <p>this Man and this Woman in holy Matrimony; which is an honourable estate,</p> <p>commended of Saint Paul to be honourable among all men: and therefore is not by any to be</p> <p>entered into unadvisedly or lightly,</p> <p>but</p> <p>reverently, discreetly, advisedly, soberly, and in the fear of God.</p>	<p><i>... the Persons to be married shall come into the Body of the church, or shall be ready in some proper house ...</i></p> <p>DEARLY beloved, we are gathered together here in the sight of God, and in the face of this</p> <p>company to join together</p> <p>this Man and this Woman in holy Matrimony; which is an honourable estate,</p> <p>instituted of God in the time of man's innocency, signifying unto us the mystical union that is betwixt Christ and his Church:</p> <p>which holy estate Christ adorned and beautified with his presence and first miracle that he wrought in Cana of Galilee, and is</p> <p>commended of Saint Paul to be honourable among all men; and therefore is not by any to be</p> <p>entered into unadvisedly or lightly,</p> <p>but</p> <p>reverently, discreetly, advisedly, soberly, and in the fear of God.</p>	<p><i>... the Persons to be married shall come into the Body of the church, or shall be ready in some proper house ...</i></p> <p>DEARLY beloved, we are gathered together here in the sight of God, and in the face of this</p> <p>company to join together</p> <p>this Man and this Woman in holy Matrimony; which is an honorable estate,</p> <p>instituted of God,</p> <p>signifying unto us the mystical union that is betwixt Christ and his Church:</p> <p>which holy estate Christ adorned and beautified with his presence and first miracle that he wrought in Cana of Galilee, and is</p> <p>commended of Saint Paul to be honorable among all men: and therefore is not by any to be</p> <p>entered into unadvisedly or lightly,</p> <p>but</p> <p>reverently, discreetly, advisedly, soberly, and in the fear of God.</p>	<p><i>... the persons to be married ... assemble in the church</i></p> <p>or some other appropriate place ...</p> <p>Dearly beloved: we have come together in the presence of God to witness and bless the joining together of this man and this woman in Holy Matrimony.</p> <p>The bond and covenant of marriage was established by God at creation,</p> <p>and our Lord Jesus Christ adorned this manner of life by his presence and first miracle at a wedding in Cana of Galilee. It signifies to us the mystery of the union between Christ and his Church, and Holy Scripture commends it to be honored among all people.</p>

Sarum (tr. Hoskin)*	1662 BCP	BCP 1789/90	BCP 1892	BCP 1928	BCP 1979
	duly considering the causes for which Matrimony was ordained.				The union of husband and wife in heart, body, and mind is intended by God
[ <i>at the blessing of the wife during mass:</i>  May she be rich in children ... and see the sons of her sons all the way to the third and fourth generation ...]	First, It was ordained for the procreation of children, to be brought up in the fear and nurture of the Lord, and to the praise of his holy Name. Secondly, It was ordained for a remedy against sin, and to avoid fornication; that such persons as have not the gift of continency might marry, and keep themselves undefiled members of Christ's body. Thirdly, It was ordained for the mutual society, help, and comfort, that the one ought to have of the other, both in prosperity and adversity.				for their mutual joy; for the help and comfort given one another in prosperity and adversity; and, when it is God's will, for the procreation of children and their nurture in the knowledge and love of the Lord.  Therefore marriage is not to be entered into unadvisedly or lightly, but reverently, deliberately, and in accord with the purposes for which it was instituted by God.

\* The Sarum liturgy has a short prologue that differs substantially from the 1662 version. However, other portions of the Sarum liturgy contain allusions similar to those in the 1662 prologue, and they are included in brackets, with an indication of where they fall in the liturgy.



### **FORMAT 3: Study Groups**

#### **Read and discuss essays found in Appendix 1 of the Blue Book Report to General Convention 2015 of the Task Force on the Study of Marriage.**

These study questions pertain specifically to particular essays on marriage that we have produced. You may use these study questions for individual or small groups or parish- or diocesan-wide forums. These questions may be used with any of our essays.

The essays in Appendix 1 of the Blue Book report are:

- A Biblical and Theological Framework for Thinking about Marriage
- Christian Marriage as Vocation
- A History of Christian Marriage
- Marriage as a Rite of Passage
- The Marriage Canons: History and Critique
- Agents of the State: A Question for Discernment
- Changing Trends and Norms in Marriage

Notes to the group facilitator:

1. This design is based on a 45-minute group discussion.
2. Ask people to read the essay(s) prior to the group meeting.
3. Because there are several essays in the Blue Book documents, each varying in length, you may want to study one essay per meeting. If you choose to discuss all essays at one session allow two-three hours.
4. It may be helpful to individuals and to your group discussion process to ask people to do questions 1-4 individually, writing down their answers prior to the full group discussion.

Questions:

1. What are two or three points in the essay that stood out for you?
2. How do these points affirm, challenge, or enlarge your personal understanding of marriage?
3. What do you think is the significance of this essay for you, your church, your community, your diocese or The Episcopal Church in the U.S.?
4. How has your understanding of marriage been changed by reading this essay? What will you do about it?
5. What are possible next steps for you, your church, and The Episcopal Church?
6. What can you — or your church or diocese — do to advance the discussion of the points in this essay?

*Note: The essay on A History of Marriage contains its own discussion questions at the end of the text, which are more specific to its content. The facilitator may use either set of questions for discussion when considering that essay.*

# TASK FORCE FOR REIMAGINING THE EPISCOPAL CHURCH

## Membership

Dr. Katy George, Convener  
The Very Rev. Craig Loya, Convener  
The Rev. Jennifer Adams  
The Rev. Joseph Chambers  
The Rev. Dr. Sathianathan Clarke  
Canon Judith Conley  
The Rt. Rev. Bishop Michael Curry  
The Rt. Rev. C. Andrew Doyle  
The Rev. Canon Marianne Ell  
The Very Rev. Peter Elliott  
Dr. Victor Feliberty-Ruberte  
The Rev. Robert Anton Franken  
The Rt. Rev. Mary Gray-Reeves  
Mr. Ian Hallas (12/5/12-9/27/13)  
Ms. Julia Ayala Harris  
The Rev. Dr. Bradley Hauff  
The Rev. Miguelina Howell  
The Rev. Leng Lim  
Mr. Thomas Little, Esq.  
Ms. Sarah Miller  
The Rev. Canon Kevin Nichols  
The Rt. Rev. Sean Rowe  
Ms. Margaret Shannon  
Mr. T. Dennis Sullivan  
Mr. Charles Wynder, Jr. (9/27/13-6/18/14)  
Mr. Jonathan York  
The Rev. Dr. Dwight Zscheile

### *Changes in Membership*

Ian Hallas resigned and was replaced by Charles Wynder, Jr.  
Charles Wynder, Jr. later resigned when he accepted his position with DFMS.

### *Representation at General Convention*

Bishop Sean Rowe and Deputy Thomas Little are authorized to receive non-substantive amendments to this report during General Convention.

## Summary of Work

**Mandate:** To urge The Episcopal Church to reimagine itself, so that, grounded in our rich heritage and yet open to our creative future, we may more faithfully: proclaim the Good News of the Kingdom; teach, baptize, and nurture new believers; respond to human need by loving service; seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation; and strive to safeguard the integrity of creation and sustain and renew the life of the earth.

**Meetings:** The Task Force met for the first time in Baltimore, Maryland on February 24, 2013; and met in person five times, working virtually between meetings until the submission of this report in December 2014.

## INTRODUCTION

The members of the Task Force for Reimagining The Episcopal Church (TREC) believe that the Holy Spirit is calling our Church to participate in God’s mission in a faithful and life-giving way in a changing world.

With that goal in mind, the Task Force spent two years in discussions with thousands of Episcopalians about their hopes, dreams, ideas, and concerns for the Church and about our collective mission to serve Christ. We also reviewed broad research on the identity and mission of The Episcopal Church in which thousands more participated. We studied how other churches and even non-religious organizations have innovated to pursue their missions in a changing world. We conferred, we listened and read, and we prayed.

In this final report, we present our recommendations for changes in the Church’s structures, governance, and administration to advance the Five Marks of Mission:

### **The Mission of the Church Is the Mission of Christ**

- To proclaim the Good News of the Kingdom;
- To teach, baptize, and nurture new believers;
- To respond to human need by loving service;
- To seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation;
- To strive to safeguard the integrity of creation and sustain and renew the life of the earth.

Please see Appendix 1 for a description of the Task Force’s mandate and membership and for a financial summary.

While structural and technical changes, by themselves, will not be sufficient for reimagining the Church in the midst of a changing world, we have come to believe that they are essential to progress — even at the local level. Chosen wisely and implemented well, these changes will give us more time, energy, and financial resources for innovation and adaptation; speed decision-making; provide Church leadership with a bold and holistic agenda for change; and reinvent the roles of church-wide organizations away from “doing” mission and toward enabling mission by connecting communities and individuals for mutual support, learning, and collaboration.

We have developed a set of recommended changes to the Constitution and Canons that we believe, if adopted, will create a streamlined, unified, and more effective church-wide governance structure. We believe these changes are critical to enabling more transformational and visionary changes to be pursued by Church leaders at local, diocesan, and church-wide levels.

In addition, we have identified key areas where we believe that in addition to technical changes, non-structural or adaptive change is urgently required for the Church to respond to the needs of the 21st century world. Therefore, we are putting forth three additional resolutions to General Convention that would call the Church to prayer, study, and action around issues that include 1) clergy preparation and financial support; 2) diocesan viability and collaboration; and 3) the use of the Church’s sacred buildings and space.

All of our work is grounded in three basic practices that we believe we must renew in our Church, and thus we start with an invitation to the Church for renewal and reimagination around these practices.

### **AN INVITATION TO THE WHOLE CHURCH**

*“After this the Lord appointed seventy others and sent them on ahead of him in pairs to every town and place where he himself intended to go. He said to them, ‘The harvest is plentiful, but the laborers are few; therefore ask the Lord of the harvest to send out laborers into his harvest. Go on your way. See, I am sending you out like*

*lamb into the midst of wolves. Carry no purse, no bag, no sandals; and greet no one on the road. Whatever house you enter, first say, 'Peace to this house!' And if anyone is there who shares in peace, your peace will rest on that person; but if not, it will return to you. Remain in the same house, eating and drinking whatever they provide, for the laborer deserves to be paid. Do not move about from house to house. Whenever you enter a town and its people welcome you, eat what is set before you; cure the sick who are there, and say to them, 'The kingdom of God has come near to you.' But whenever you enter a town and they do not welcome you, go out into its streets and say, 'Even the dust of your town that clings to our feet, we wipe off in protest against you. Yet know this: the kingdom of God has come near.'"* –Luke 10:1-11

The Church began as a movement, not an institution. Early Christians developed organization and structure as a necessary way to preserve, support, and spread the Jesus movement. The Book of Acts describes this as an exciting and dynamic process of experimentation, discernment, and discovery.

The movement always precedes the institution, and practice always precedes structure. For this reason, we believe the most important thing we can do together in this moment is return to three basic practices that helped to animate the early Christian movement. We believe that, rather than an anxious focus on how to preserve our institution, a joyful focus on the basic practices of the movement will hold the real key for moving us into God's future. As in the past, the new future of The Episcopal Church will emerge from a focus on adapting and renewing the movement's basic practices in our own various local contexts while adapting the current structures to enable and even encourage this movement to catch on.

For a Church accustomed to expecting people to find it and join its established life, this story from Luke's Gospel calls us to simple yet transformational practices that the Church at every level must embrace today:

**Follow Jesus together.** The Episcopal Church's identity is rooted in Jesus and his Way. The renewal of our Church will come only through discerning the shape of that Way and practicing it together in the power of the Spirit. Christianity is an embodied way of life, not just an institution or set of ideas. The Episcopal Church has a distinct and rich heritage of interpreting and expressing Jesus' Way. Every local church and every Episcopalian must be called to follow Jesus more deeply.

**Into the neighborhood.** Jesus sends us together into the places where ordinary life unfolds. We are sent to testify to God's reign as we form and restore community by sharing in God's peacemaking and healing. This begins with deep listening to neighbors, relying upon their hospitality rather than expecting them to find us on our terms. In today's increasingly diverse world, we must learn how to bear witness to, and receive from, those of different cultures, faiths, and beliefs, "eating what is set before us." For many churches now disconnected from neighbors, this will mean attempting small experiments in sharing God's peace as we learn how to form Christian community and witness with those neighbors.

**Travel lightly.** Jesus sends us out empty-handed so that we might rely upon God's abundance, which sometimes comes to us through the hospitality of our neighbors. We must hold inherited structures loosely as we make space for alternative patterns of organizing our life together. We must discern what of our traditions is life-giving and what unduly weighs us down. Traveling lightly means going in vulnerability, risking being changed by God and our neighbors.

We invite local congregations, dioceses, and the wider Church structures to enter into a season of sustained focus on what it means for us in this moment, in our various local contexts, to follow Jesus, together, into the neighborhood, and to travel lightly.

We must learn how to form Christian community and practice Christian witness in environments where the culture no longer supports Christian identity, practice, and belonging as it once did. This work of learning and discovery must take place at all levels of the Church, although it is primarily local work.

While the primary challenges facing the Church in today's world are theological, spiritual, and cultural, the members of the Task Force have come to believe that meeting those challenges will require organizational and structural evolution.

*“Neither do people pour new wine into old wineskins. If they do, the skins will burst; the wine will run out and the wineskins will be ruined. No, they pour new wine into new wineskins, and both are preserved.”*

– Matthew 9:17

### **WHY THE CHURCH NEEDS TO CHANGE**

The 21st century represents a profoundly different environment for The Episcopal Church, with new challenges and opportunities. While The Episcopal Church once held a place of cultural privilege in American society, it must now earn a hearing as one small voice among many competing for influence in the public sphere. In some circles, we gained a reputation as the Church of the white, wealthy, and powerful, but this exclusivity is at odds with God's calling for us today. The institution will need to respond to profound cultural and societal changes, including the end of the cultural Christian era, a time when our membership grew partly because our surrounding culture supported the practice of Christianity and Church attendance.

The Church's structures and governance processes have not yet responded to the profound changes occurring across the country and around the world. We see this in our inability to deal with very real and pressing issues: many of our parishes are no longer financially self-sufficient and cannot afford full-time stipended clergy. Many of our churches are disconnected from the neighbors who surround them, with expensive buildings that consume too many resources to maintain. Young people called to ordained ministry face a mountain of debt at the end of their seminary training that they may not be able to repay. While our Church structures and governance have offered a platform for public witness and have helped to create a more inclusive Church committed to practicing and advocating for justice in the world, they have been less effective at addressing other pressing issues.

Episcopalians collaborate in many ways, from local collaborations around youth ministry or serving the poor, to working together on global challenges that call for Christian witness and support. But there are also enormous opportunities that we miss or abandon. For example, collaboration among dioceses, whether through sharing resources, staff, or engaging in more joint initiatives, would strengthen the practice of our faith and the Church itself.

To be sure, our Church is already full of examples of new growth and innovation: grassroots networks such as the Episcopal Service Corps and the Acts 8 Moment are doing extraordinary and innovative work, and are catalyzing the kinds of necessary changes at all levels of the Church. New Church plants in several places, experimental new communities of faith, and new models of clergy formation — both new initiatives at several traditional seminaries and in new models such as the Bishop Kemper School for Ministry — are all examples of life, creativity, and adaptation that are already emerging across the Church.

But we have not demonstrated a capacity at the church-wide level to focus keenly on these and other top priorities and to then align human, financial, and structural resources to address them. In the next sections of this report, we describe the adaptive agenda of innovation that we recommend to the Church, and the structural changes to our Church Constitution and Canons that we believe will help to enable this innovation.

**The engagement process**

TREC reached out to Episcopalians to find out what they want the Church to keep and what they want to change. We created an “engagement kit” to capture people’s feelings about the Church today and their dreams for its future.

Our aim was to use an open, welcoming, upbeat, and stimulating approach to foster a culture of participation, engagement, and collaboration. We designed it to make it easy to facilitate the engagements; to participate; and to record the findings in a variety of settings with different group sizes and demographics, including language and literacy.

We reached out to a diverse group representing today’s Church and the Church of ten years from now; to opinion leaders and influencers, including many who do not hold official positions; and to people who are active in the Church and those who are less active.

Between 1,500 and 2,000 Episcopalians participated online and in person, and individually and in groups. They included bishops, priests and deacons, vestries, seminary students, deans and faculties, and dioceses and parishes meeting together. Members of the Task Force led many of the engagement sessions, and some groups held engagements without a TREC member present.

On October 2, we held an innovative church-wide gathering at the Washington National Cathedral that combined in-person attendance with a live webcast. We encouraged attendance from each diocese, including a bishop, a lay deputy, a clerical deputy, and one person under the age of 35. More than 140 people attended in person at the Cathedral, and more than 4,000 tuned in to the webcast. Members of the Task Force made four brief presentations and answered questions from the live audience and via Twitter and email during five question-and-answer periods.

We also sought input from people involved with the Church’s governance and administrative structures, the Presiding Officers, the COO of the Domestic and Foreign Missionary Society, members of the staff of the church-wide administrative structure, and others closely engaged at the church-wide level.

We believe that both our “engagement kit” and our live webcast helped us engage Church membership more broadly and more directly than we could using more traditional representative approaches. We hope Church groups will use these and other new engagement methods in the years ahead.

*Therefore, if anyone is in Christ, there is a new creation. The old has passed away; behold, the new has come.*

– 2 Corinthians 5:17

### **AN URGENT AGENDA OF REIMAGINATION**

We believe that to adapt to today’s needs and to strengthen its ability to serve God’s mission as Luke described, The Episcopal Church must address how we “do the work we have been given to do” at every level — congregational, diocesan, and church-wide. We believe that the Church must reconsider many of its current practices around congregational and diocesan collaboration, congregational and leadership development, clergy formation, Church Pension Fund incentives and initiatives, and the use of our sacred buildings.

We debated whether to present these recommendations to the Church in resolution form. They are, in many ways, more comprehensive than resolutions of General Convention tend to be. They integrate governance and culture, administration and identity, and polity and practice. They are also, by virtue of their breadth, less detailed than some might wish.

But we believe the Church needs to address these issues directly and immediately, and the legislative process is the primary means by which we as The Episcopal Church endorse and fund our communal priorities and directions. The “perfecting” of resolutions is a process shared by members of the Church who are General Convention, bishops, priests, deacons, and lay people from around the whole Church. We recognize that what TREC presents is only one of the steps in this church-wide conversation and process. And so we put forth three resolutions for General Convention that, if embraced as critical issues and adopted for further action, will engage the Church at every level in faithful and constructive conversation and planning.

We believe this work is at the heart of the reimagination to which we have been called as a task force. In turn, our call to the Church is to come together in collective and constructive reimagination around three topics:

- Restructuring for spiritual encounter;
- Reimagining dioceses, Bishops, and General Convention;
- Restructuring assets in service of God’s mission in the future.

We have designed these resolutions to call all parts of the Church — not just the central governance structures — to engagement. Change around these issues will be both technical and adaptive based on specific canonical recommendations we have included; and experimentation and learning at local, diocesan and church-wide levels. They propose renewed ways not only of speaking to the world, but also of being together, and progress will be driven by a commitment to collaboration across structures that may have no formal connectivity today. Therefore, these resolutions are:

- Holistic, systemic, and intentionally overlapping, designed to catalyze discussion and experimentation by all parts of the Church in the work of problem-solving, resource-sharing, and mission-making.
- Direct yet open — a combination of specific and general recommendations. We have included specific recommendations where we have them, but believe that “filling in the gaps” is the work of a larger whole, collectively addressing the challenges and opportunities before us.

We repeat the full text of the resolutions and include an explanation for each in Appendix 3.

**PROPOSED RESOLUTIONS**

**A001: RESTRUCTURE FOR SPIRITUAL ENCOUNTER**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention urge Episcopal seminaries to work collectively in creating, nurturing, and developing a culture of collaboration among them that results in: new structures; new curricula; new degrees beyond the traditional MDiv; partnerships and practices on the academic, departmental, and inter-seminary level; tangible, measurable evidence that seminary trained leaders (lay and ordained) have the spiritual formation, skill sets, and intellectual aptitude to engage the world and to transform and lead The Episcopal Church, looking beyond competency in the academic areas defined by canon; standards of accountability, reporting, and mutual ministry reviews at all levels; and Episcopal seminaries' reportage of their progress to Executive Council and to each succeeding General Convention; and be it further

*Resolved*, That Diocesan Councils and Commissions on Ministry, in collaboration with their Bishop, encourage and support diverse ways for ordained clergy to make a living inside and outside the Church; and be it further

*Resolved*, That the Executive Council study the issue of clergy compensation; and be it further

*Resolved*, That the Trustees of the Church Pension Fund study the following and report to the 79th General Convention: the current pension offerings and how well they serve the Church; the incentives in the current pension system; pension plan opportunities available to Episcopal clergy working in the secular world who are providing non-stipendiary service to The Episcopal Church; compensation models and pension benefits that may not be adequate or may be just in certain areas of the Church, particularly in dioceses outside the U.S.; and be it further

*Resolved*, That the Domestic and Foreign Missionary Society develop a network to help Episcopal congregations, including clergy, vestry, organist, musical, lay, and other liturgical leaders, to become skilled in creating, nurturing, and developing spaces and moments for spiritual encounters that transform lives and unjust structures; and to have partnerships and practices with other congregations to become excellent stewards of spiritual, financial, real estate, and community resources; and to report their progress and learning annually to their Diocesan Convention/Council and Bishop.

**A002: REIMAGINE DIOCESES, BISHOPS, AND GENERAL CONVENTION**

**A) Reimagine Governance Structures**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention adopt a unicameral model of governance as outlined in amendments to Article I, Sections 1-6 of the Constitution as proposed in TREC's final Report; and be it further

*Resolved*, That the bishops of The Episcopal Church create, nurture and develop a culture of collaboration that results in: new structures, partnerships and practices on the interpersonal, group, and organizational levels; measurable, tangible outcomes of performance; standards of accountability, reporting and mutual ministry reviews at all levels (bishops, clergy, diocesan bodies); frank discussion on the number and size of our dioceses and whether change is needed; and report their progress to each succeeding General Convention; and be it further



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

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

*Resolved*, That the diocesan assessment percentage be lowered while making it canonically mandatory (with means for pastoral exception) for each diocese to meet that assessment.

**B) Make Constitutional Changes to Achieve a Unicameral Legislative Body**

*Resolved*, the House of \_\_\_\_\_ concurring, That Article I, Sections 1-6 of the Constitution be stricken in their entirety and replaced with the following:

**The Episcopal Church Constitution, ARTICLE I**

**Sec. 1.** There shall be a General Convention of this Church in which all members shall meet together as one body. Each of the three orders — Bishop, Clerical, and Lay — may meet and deliberate separately except as the constitution, canon, or rule of order may otherwise provide. On any matter requiring a vote, any order may choose to deliberate and/or vote separately. In all deliberations, freedom of debate shall be allowed, subject to such rules of order as may be adopted to assure fairness.

**Sec. 2.** Each Bishop of this Church having jurisdiction, every Bishop Coadjutor, and every Suffragan Bishop shall have a seat and a vote in the General Convention and any matter acted upon separately by the Order of Bishops. A majority of all Bishops and Deputies entitled to vote shall be necessary to constitute a quorum for the transaction of General Convention business.

**Sec. 3.** At the General Convention next before the expiration of the term of office of the Presiding Bishop, the General Convention shall elect one of the Bishops of this Church having jurisdiction as the Presiding Bishop of the Church. The Presiding Bishop of the Church shall serve as a co-chair of General Convention. Candidates for the Presiding Bishop shall be elected by the General Convention, by concurrent vote of each order. The affirmative vote of a majority of the deputies of each order shall be required for the election of a Presiding Bishop. The term and tenure of office and duties and particulars of the election not inconsistent with the preceding provisions shall be prescribed by the Canons of the General Convention. If the Presiding Bishop of the Church shall resign the office as such, or if by reason of infirmity shall become unable to serve, or in case of death, the Bishop who, according to the Rules of the Order of Bishops, becomes its Presiding Officer, shall (unless the date of the next General Convention is within three months) immediately call a special meeting of the Convocation of Bishops to elect a member thereof to be the Presiding Bishop. The

certificate of election on the part of the Convocation of Bishops shall be sent by the Presiding Officer to the Standing Committees of the several dioceses, and if a majority of the Standing Committees of the dioceses shall concur in the election, the Bishop elected shall become the Presiding Bishop of the Church.

**Sec. 4.** In addition, the Church in each diocese that has been admitted to union with the General Convention, each area Mission established as provided by Article VI, and the Convocation of Episcopal Churches in Europe, shall be entitled to representation in the General Convention by three ordained persons, priests, or deacons (“Clergy”) canonically resident in the diocese, and not more than three lay persons, confirmed adult communicants of this Church, in good standing in the diocese but not necessarily domiciled in the diocese; but the General Convention by Canon may reduce the representation to not fewer than two deputies in each order. Each diocese, and the Convocation of Episcopal Churches in Europe, shall prescribe the manner in which its deputies shall be chosen. To constitute a quorum for the transaction of business, the Clerical order shall be represented by at least one deputy in each of a majority of the dioceses entitled to representation, and the Lay order shall likewise be represented by at least one deputy in each of a majority of the dioceses entitled to representation.

**Sec. 5.** The vote on all questions that come before the General Convention shall be governed by the following provisions, supplemented by such procedural provisions as the General Convention may adopt in its Rules of Order: Unless a greater vote on any question is required by this Constitution or by the Canons in cases not specifically dealt with by this Constitution, voting by orders shall not be required, and the affirmative vote of a majority of all Deputies present and voting shall suffice to carry any question.

When voting by orders is required, unless a greater vote on any question is required by this Constitution or by the Canons in cases not specifically dealt with by this Constitution, the affirmative vote of a majority of all Deputies of each order (clergy, lay, and Bishops) present and voting shall suffice to carry any question. A vote by orders on any question shall be taken if required for that question by this Constitution or by the Canons or if clerical, lay, or Bishop representation from three or more separate dioceses shall so request at the time of the call for the vote on that question. In voting by orders, the vote of each order shall be counted separately, each order in each diocese shall have one vote, and a vote in the affirmative by an order in a diocese shall require the affirmative vote of a majority of the Deputies present in that order in that diocese. To carry in the affirmative any question being voted on by orders requires concurrence in the affirmative by all orders and, unless a greater vote is required by this Constitution or by the Canons in cases not specifically dealt with by this Constitution, concurrence in the affirmative by an order requires the affirmative vote in that order by a majority of the dioceses present in that order.

**Sec. 6.** At the General Convention, a majority vote of those Deputies present, even though less than a quorum, may adjourn from day to day.

A003: RESTRUCTURE ASSETS IN SERVICE OF GOD’S MISSION IN THE FUTURE

Resolved, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct every diocese to develop a theology of sacredly inclusive use-of-space that is adaptive and generative financially and spiritually; and be it further

*Resolved*, That the Presiding Officers, in consultation with Executive Council, convene regional consultative groups of professionals such as developers, financiers, architects, designers, community organizers, urban planners, artists, social entrepreneurs, and lawyers to serve as a resource for congregations seeking to re-envision their space and its possible uses, with an eye for demographic changes and trends in their region, and that \$200,000 be allotted for this purpose; and be it further

*Resolved*, That Bishops, Deans, Chapters, Rectors, and Vestries work collaboratively with congregational and community partners, and that every Episcopal cathedral, congregation, religious community, and institution work to re-envision their purpose in a spiritually hungry, community-seeking, and contemporary culture, considering especially the potential for full-scale community involvement in the use of its space and its strategic role in their context at large; and be it further

*Resolved*, That the Standing Committees of each diocese create standards for intervention and endowment spending policies; and designate Future Generation Funds to be good stewards of God's gifts, while caring for generations yet to come.

### **NEW ROLES FOR CHURCH-WIDE STRUCTURES**

As the Church accelerates what we see as an urgent process of reimagination and renewal, we believe that it must also renew its governance structures. The governance model that may have served us well in one historical period does not seem to serve us as well today. For many Episcopalians (and prospective Episcopalians) our decision-making processes are often opaque, ineffective, or both, making it difficult for the Church to make the tough tradeoffs or pursue the bold new directions that are demanded of us today.

Around the world, networks are overpowering hierarchies. Profound changes are flowing from collaborative, co-creative, participatory relationships; from shared knowledge; and from communal power, while bureaucracies struggle to keep up. To equip all Episcopalians for ministry and mission in their daily lives in this century and the next, we must harness that power and grasp new opportunities by transforming the church-wide organization to make it less hierarchical and more participatory. Governance bodies that are more accountable and enable faster decision-making at the church-wide level are essential if the Church is to become more faithful and life-giving in the years to come. Some parishes will be able to address their urgent local challenges only after change occurs at the top.

In speaking with people about their hopes and dreams for the Church, we got a clear picture of what they love about the Church and what should not change. We also found disagreement on a wide range of important topics, from how the Church engages on social issues, to how it chooses music for services. In Appendix 4, we provide details about our findings around our core identity as a Church and what we therefore should preserve.

A few themes emerged in discussion after discussion, all pointing to the need to:

- **Focus more deeply on local missions and community-building:** In today's world, members want to build more meaningful personal engagement in Christ-centered community and mission. Forming Christian community should be the priority for the Church, both within existing congregations and with new populations and generations. Our recommendations reflect the fact that this is primarily a local task.
- **Make better decisions more effectively and allocate resources more wisely:** The Church can and should respond to a changing world with more insight and agility as social and economic transformations unfold faster than ever. Many of the Episcopalians we spoke with believe that we need to adapt more quickly and use our resources more wisely to participate in God's mission, support the marginalized, and foster new emerging local communities.

- **Make more space for innovation that emerges from all parts of the Church:** As innovation expands our boundaries, members are willing to experiment and adapt to stay meaningful and relevant and increase our vitality. In the decades ahead, the transformational work of the Church may have less to do with buildings, ceremonies, and large groups of well-dressed people gathering on Sunday morning and more to do with smaller, close-knit groups confronting anguish and affliction and searching for hope beyond the Church grounds.

*Changing church-wide structures to more clearly reflect our mission*

To begin changing the way the Church operates in the 21st century, we have identified a handful of priorities. They will not transform all church-wide structures and governance to create the network we envision, but taken together, we see them as critical first steps and enablers of further change:

- We must evolve and focus the scope of our church-wide agenda, including the breadth of issues addressed in General Convention legislative sessions, more keenly on local faith formation and local mission that enables and accelerates local innovation and adaptation.
- For the scope that remains at the church-wide level, we must create clearer, more effective, and more accountable leadership to define agendas, set direction, develop expertise around complex issues and their implications, make tough choices, and pursue bold and disruptive ideas where appropriate. This has implications for the General Convention, Executive Council, Chief Executive functions, and for the Church's Committees, Commissions, Agencies and Boards (CCABs).
- Once a direction is set for the church-wide work, we must empower a streamlined and accountable staff to build capacity across our Church and act as network catalysts and network builders — without losing our rich institutional memory or passion for mission and ministry. This staff must be directed and supervised by professionals with deep and relevant expertise and experience. The scope of mission-related staff work should be specific and time-bound.
- We must create a church-wide structure that is accountable for following the direction that is set, ensuring a high quality of work and driving effective use of resources. This means that church-wide staff must set clear objectives at the start of any project or endeavor, and track and report clear progress.

We believe that addressing these priorities will enable the Church to continue to evolve and streamline its governance and structures in areas that we may not have addressed.

We also believe that focusing on these priorities will help the Church address its most complex and urgent issues where deep study and bold action are required.

**RECOMMENDED CHANGES TO THE CONSTITUTION & CANONS**

To begin the journey of change we envision, we have developed a set of resolutions that we urge the General Convention to adopt as a complementary and cohesive package. In developing these resolutions, we have focused on what we consider essential to making church-wide structures, governance, and administration more faithful and life-giving.

We recognize that these changes will not in themselves transform the Church and its health, but we believe they are critical to paving the way for the Church to address the pressing issues that it faces, down to the local level; and to continuing the innovation and growth that mark the most vital parts of our Church and will allow us to pursue our mission.

Our specific resolutions, provided in Appendix 5, address the following areas of our Constitution and Canons:

*Improvements to the effectiveness of the General Convention*

- As described above, we have recommended a resolution to establish a unicameral legislative body. Diocesan deputations are to be made up of bishops, three priests, or deacons and three lay. A unicameral convention will make us a more truly deliberative body and will more closely share governance across all orders of ministry as bishops, priests, deacons, and lay persons are in direct conversation with one another as they discern some of the most important issues facing us.
- Since this is a constitutional change that will require two General Conventions to approve, we recommend that a task force be appointed to shape the legislative agenda and rules to reflect a legislative session with a reduced scope that is more effective. Our vision and hope is that 2021 and subsequent GCs would include no more than five legislative days.
- We recommend three voting orders in the General Convention: Lay, Clerical, and Bishops. For many resolutions, the three Orders would vote together, by voice vote or electronically. In these votes, a majority of those present and voting would be required to pass a resolution. In a vote by Orders, approval of a majority of all three Orders would be required to pass resolutions. The General Convention — by a vote of all three Orders — will elect the Presiding Bishop.
- The Lay and Clergy Orders would elect one of their Deputies as the Presiding Deputy. The Presiding Deputy would receive a stipend in order to enable a greater number of lay and clergy persons to serve as viable candidates for this position.
- The Presiding Bishop and the Presiding Deputy (PD) would alternate presiding at sessions of General Convention.
- Retired bishops should no longer have a vote in the current House of Bishops or in the new unicameral body.
- Meetings of bishops between General Conventions would be called convocations of bishops, since there would no longer be two legislative houses of the General Convention.
- The General Convention would evolve to become a church-wide mission convocation alongside the legislative body. The primary focus of such a gathering would be to convene local mission practitioners to celebrate, to share learning and best practices, and to develop mission-focused networks and collaborations.

*Roles and election or appointment of the central executive structures and staff of the Domestic and Foreign Missionary Society (DFMS)*

- Clarifications of the executive authority of the Presiding Bishop:
  - The Presiding Bishop & Primate of The Episcopal Church is the chief pastor, spiritual leader, principal local and international representative, and prophetic voice of the Church. Within the scope of his or her duties and responsibilities, the PB also has a chief executive role in the church-wide organization as President of DFMS and Chair of the Executive Council. This role is equivalent to a chief executive officer within the bounds of the Constitution and Canons of the Church, and it is exercised in congruence to the highest ethical call of the Gospel to be a good steward of the gifts, talents, and treasures entrusted by God to the Church. As such, the PB should be retained as the CEO of the Church, Chair of the Executive Council, and President of DFMS, with clear managerial responsibility for all DFMS staff.
  - The Presiding Deputy should be retained as Vice President of the Church, Vice Chair of the Executive Council, and Vice President of DFMS.
  - To support and empower the mission of the Church, from the church-wide organization, the PB should be responsible for nominating or appointing, as applied, with the concurrence by the Presiding Deputy, four officers in charge of general management, clerical, financial accountability, and legal advice. These four officers would serve and stand in position of trust and confidence of the Presiding Bishop in his or her role as chief executive officer of the Church.

- The Church General Manager should perform those duties and responsibilities typically assigned to a chief operating officer within the bounds of the Constitution and Canons of the Church.
- The Church Treasurer should perform those duties and responsibilities typically entrusted to a chief financial officer within the bounds of the Constitution and Canons of the Church.
- The Church Secretary should perform those duties and responsibilities typically delegated to a general clerk within the bounds of the Constitution and Canons of the Church.
- The Church General Chancellor should perform those duties and responsibilities typically commended to a chief legal officer within the bounds of the Constitution and Canons of the Church.
- The Council, by a two-thirds vote, would have the authority to discharge the Church General Manager, the Church Treasurer, the Church General Chancellor, and the General Convention Executive Officer.
- Mutual ministry reviews should be established among PB, PD, and EC, including a review prepared by the PB of overall staff focus, objectives, effectiveness, and outcomes.
  - We propose no change in role or reporting structure of Secretary of the General Convention. Similarly, we propose no change in role or reporting structure of the Office of General Convention. The executive officer of General Convention would continue to report to the Executive Council.

*Changes to the role, size, and selection of the Executive Council*

- The role of the Executive Council should be clarified as governance rather than operational. We will provide examples of a governance agenda and role in our description of our vision. Our vision is that the Executive Council should adopt operating procedures and practices that reflect best organizational and spiritual practices in governance team formation and operation.
- The Executive Council should be reduced from 42 to 21 members to improve its effectiveness as a board. Proportionality among the orders of Council membership is retained.
- The Executive Council membership should include the Presiding Bishop and Presiding Deputy as *ex officio* voting members, and the Church General Manager, Treasurer/CFO, Secretary, Church General Chancellor, and Executive Officer of General Convention as non-voting members, plus 11 members elected “at large” at General Convention and nine members nominated provincially and elected at General Convention. Executive Council members would serve a term of six years, with half elected every three years. All nominees for Executive Council would be proposed by the Joint Standing Committee on Nominations (with nine originating from provincial nominations to the nominating committee).
- The Joint Standing Committee on Nominations would create a description of specific skills such as financial expertise and other general attributes, as well as spiritual gifts such as wisdom, discernment, insight, and prayer needed on the Executive Council. The goal is that Executive Council collectively have all the skill sets, life experience, and spiritual gifts needed to function well as a governance board; and address the most pressing church-wide priorities in a given triennium. The Joint Standing Committee on Nominations would also be directed to consider diversity, geographic representation, and representation of the three orders in selecting candidates. Nominations for EC would not be taken from the floor of General Convention.
- Functioning in an oversight role similar to that of a board of directors, the Executive Council would not have its own staff. The Presiding Bishop and the Executive Council would rely on DFMS staff to support the work for which they are responsible.

*Reduction in the number of Standing Commissions and their scope*

We recommend:

- Eliminating all Standing Commissions except the Standing Commissions on Liturgy and Music, and Constitution and Canons. We believe these committees are essential to the functioning of the General Convention and our Episcopal identity. Other commissions are important, but there are more effective ways to do their work. We propose no change to those joint standing committees called for in the Rules of Order (such as the Joint Standing Committee on Nominations; and the Joint Standing Committee on Program, Budget, and Finance). If a unicameral model for General Convention is adopted, the Rules of Order will need to be revised in the triennium immediately prior to final constitutional approval.
- Renaming the Standing Commission on Liturgy and Music “Theology, Liturgy, and Music” to enhance its role in evaluating and developing proposals related to the core Episcopal identity and Church life in aspects of Anglican tradition, worship, and Christian life.
- Renaming the Standing Commission on Constitution and Canons “Governance, Constitution, and Canons” to strengthen its role in assessing both structural changes and policy amendments to foster, in a holistic manner, institutional-renewal issues and ecclesiastical adjustments needed in light of societal transformations.
- Charging the presiding officers, in consultation with the Executive Council, to appoint such task forces necessary to carry out the work of a General Convention on a triennium-by-triennium basis. Task forces would dissolve at the end of the triennium unless specifically reappointed.
- The presiding officers should make greater and more direct use of DFMS staff resources or DFMS-hired expert consultants to study issues and develop proposals to address priorities identified by the GC.

**All of these recommendations are meant to help everyone in the Church participate more fully in God’s mission. Imagine a Church where...**

all of our congregations are so spiritually vibrant and mission-focused that they consistently inspire their parishioners in new ways and appeal to new generations and populations;

our Church changes shape as existing parishes merge and reinvent themselves to meet local needs while new parishes emerge in new places and new ways;

Episcopal clergy and lay people are renowned for their leadership, including in transforming the Church, building communities, and organizing them for mission;

Episcopalians collaborate more easily across the Church, forming communities of interest and working together to share knowledge, resources, and ideas;

the church-wide structure serves mainly to enable and magnify local mission through a collaborative network while it lends its prophetic voice.

**OUR RATIONALE FOR THESE RECOMMENDATIONS**

The Task Force debated many ways in which the Church could address what we have come to understand as its most pressing needs and priorities. In some cases, we published several alternatives for feedback and discussion. In one paper, for example, we laid out alternative approaches to creating a more focused and accountable “executive” function.

In two years of deliberations, we came to consensus around solutions that we feel can help our Church more faithfully follow the Way of Jesus in our day without losing what we most deeply value in our polity,

including the balance of involvement and decision-making among Bishops, clergy, and laity. We also have sought to maintain an adequate representation from all provinces in Church governance structures, although we have tried to balance this representation, in the case of the Executive Committee, with a streamlined and more effective structure.

- *We believe that our recommendations will help the Church pursue each of these priorities:*
  - *Clearer responsibilities:* In particular, the Presiding Bishop's office will have the central responsibility for directing church-wide staff.
  - *Greater accountability at all levels of the church-wide organization:* In clarifying one of the roles of the Presiding Bishop as "chief executive" of the Church, we also expect that the Presiding Bishop will be accountable for setting an explicit, overarching vision and strategy for the Church and for directing church-wide resources effectively, efficiently, and narrowly in pursuit of this strategy. The Presiding Bishop's office will be accountable to the Executive Council for performance review in this specific aspect of the Presiding Bishop and her or his staff's roles. The Executive Council is, in turn, accountable for progress and outcomes to the broader General Convention. Church-wide mission staff will be measured and evaluated on specific objectives associated with specific priorities set and agreed to by the Executive Council.
  - *Faster and more effective decision-making:* By empowering the Presiding Bishop and the Executive Council as an effective executive function and governing Board, we believe that our Church will be able to reach decisions efficiently and effectively.
  - *Greater expertise in supporting decision-making:* We believe the Church relies too often on ad hoc task forces of volunteers to address serious and complex issues (and TREC is no exception). We recommend shifting the responsibility for studying critical issues defined by the General Convention to the Presiding Bishop's office, which would have the flexibility to hire expert staff for specific challenges and projects. We would expect the Presiding Bishop's office, under the governance of the Executive Council, to form advisory boards of world-class experts to inform the work of the staff. Our rationale for streamlining the Executive Council is that its membership and work will improve if the criteria and skills required for membership are more clearly defined. We also believe that a smaller number of members means more selectivity and status, and that clearer governance roles will increase the impact of the work. Today's nomination process is uneven in its quality; we do not recruit for all the skills needed, and we have a history of bad experiences on the Council in terms of substantial time commitments and low-impact work.
  - *More responsiveness to local needs and local mission in the use of our collective resources:* Most of the important mission work of our Church happens at a local level, with some exceptions, such as our public advocacy around important social justice issues. We believe that church-wide mission staff spend too much time today "marketing" their services and capabilities to dioceses, many of which also have diocesan services covering the same areas. A centrally coordinated staff will be able to focus resources more keenly where they are needed most.
- *While clarifying roles, we have tried to preserve Church polity:* Episcopalians have told us that they greatly value the polity we have established as a denomination, including the practices of shared leadership and governance with bishops, priests, deacons, and lay people participating in discernment and decision-making at almost every level of church life, including General Convention. We have sought to maintain this balance, although we have proposed clarifying the role of the Presiding Bishop in setting and executing Church strategy, and making the PB and her or his office more accountable to the Executive Council and to the General Convention.
- *Impact on provincial representation in Church governance:* We believe that provinces are well-represented by their deputations to General Convention, and that the Executive Council should be a smaller body whose members are chosen for their talents and capabilities rather than for their ability to represent a specific province. In proposing to make the Executive Council more accountable to the General Convention, we believe that we would offset the reduction in provincial representation on the Council.



**LEADERSHIP AS THE CRITICAL ENABLER**

Transitioning the Church to new structures of governance and administration will be challenging for leaders in all orders of ministry and in all places in the Church. Delivering on the exciting but tough agenda for reimagination will be even more challenging. These tasks will take both resolve and capable leadership at all levels who can catalyze broad and deep cultural change within the Church. We will have to work through a grieving process as we individually and collectively lose structures and practices that have been critical parts of our lives and even of our identities.

At the same time, we will have to find a way of adopting a new and more hopeful mindset: we will need to believe — truly believe — that The Episcopal Church can, should, and must grow! Leadership formation and development will be critical to this process of change. We need leaders who can usher us into a new era using skills in evangelism, church planting, congregational renewal, community outreach, and cross-congregation and cross-diocesan collaboration.

As a way of catalyzing the kind of conversations that will help support and inspire the leadership development that will be necessary, we have sponsored the creation of a series of online leadership classes developed by ChurchNext. These classes, to be made available over the next several weeks, feature a variety of voices from around the Church reflecting on the changing shape and demands of leadership in the Church.<sup>1</sup>

**CONCLUSION**

Episcopalians around the world are faithfully innovating and adapting to changing social and economic realities in advancing the Five Marks of Mission. Filled with the Holy Spirit, they are reimagining the Church on their own every day — without the guidance of the General Convention, TREC, or any other committee or task force.

Real change is challenging and at times even painful, because it involves the loss of things familiar and precious to us. But change can also be life-giving, and it is upon us. We must act.

We can move forward together with faith: the Holy Spirit has breathed new life into the Church at countless times and in countless ways in the past, and the same Spirit will continue to guide us in the future.

The members of the Task Force believe that the recommendations we have laid out here will help the Church focus and direct the extraordinary spiritual, human, and material resources God has entrusted to us. Moving forward, in several ways and places, yet always as one Body, we can be truly faithful and effective in participating in God's mission in the world.

We can follow Jesus together, into the neighborhood, and travel lightly.

*O God of unchangeable power and eternal light: Look favorably on your whole Church, that wonderful and sacred mystery; by the effectual working of your providence, carry out in tranquility the plan of salvation; let the whole world see and know that things which were cast down are being raised up, and things which had grown old are being made new, and that all things are being brought to their perfection by him through whom all things were made, your Son Jesus Christ our Lord; who lives and reigns with you, in the unity of the Holy Spirit, one God, for ever and ever. Amen.*

– Book of Common Prayer, page 528

<sup>1</sup>Instructors include Dwight Zscheile, Frederica Thompsett, Stephanie Spellers and Winnie Varghese.

## Budget

The 77th General Convention allocated a budget of \$200,000 for the work of the Task Force on Structure — C095. The Task Force also received a grant of \$150,000 from the vestry of Trinity Church Wall Street. To date, the Task Force on Reimagining The Episcopal Church (TREC) has spent and committed a total of \$190,000.00.

### **APPENDICES**

1. TREC's mandate, membership, and budget summary
2. Church engagement process and findings
3. Resolutions and explanations to support agenda of Church reimagination
4. Episcopal identity and the role of the church-wide structure
5. Resolutions for proposed changes to the Canons

### **Appendix 1: TREC'S Mandate, Membership, and Financial Summary**

The Task Force for Reimagining The Episcopal Church was formed in response to C095, a resolution passed by the 77th General Convention in Indianapolis in July 2012. The full text of this resolution is included below.

The Presiding Officers received nominations for task force membership and jointly appointed the 24 members listed below.

The Task Force met for the first time in Baltimore, Maryland on February 24, 2013; and met in person five times, working virtually between meetings until the submission of this report in December 2014.

The 77th General Convention allocated a budget of \$200,000 for the work of the Task Force on Structure — C095. The Task Force also received a grant of \$150,000 from the vestry of Trinity Church Wall Street. To date, the Task Force on Reimagining The Episcopal Church (TREC) has spent and committed a total of \$190,000.00.

As specified in C095, TREC held a special gathering to receive responses to the proposed recommendations to be brought forward to the 78th General Convention. The gathering was held both in person at Washington National Cathedral and through a live webcast.

TREC encouraged all Episcopalians and interested parties to attend in person or virtually, and particularly encouraged each diocese to include at least a bishop, a lay deputy, a clerical deputy, and one person under the age of 35.

More than 140 people attended in person at the Cathedral, and more than 4,000 tuned in to the webcast. Members of the Task Force made four brief presentations and answered questions from the live audience and via Twitter and email during five question-and-answer periods.

TREC is grateful to Washington National Cathedral and to Trinity Wall Street for supporting this innovative and inclusive gathering format.

#### **TREC's Enabling Resolution C095**

*Resolved*, the House of Bishops concurring, That this General Convention believes the Holy Spirit is urging The Episcopal Church to reimagine itself, so that, grounded in our rich heritage and yet open to our creative future, we may more faithfully:

- Proclaim the Good News of the Kingdom
- Teach, baptize, and nurture new believers
- Respond to human need by loving service
- Seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation
- Strive to safeguard the integrity of creation and sustain and renew the life of the earth; and be it further

*Resolved*, That this General Convention establish a Task Force under the Joint Rules of Order, whose purpose shall be to present the 78th General Convention with a plan for reforming the Church's structures, governance, and administration; and be it further

*Resolved*, That this Task Force shall be accountable directly to the General Convention, and independent of other governing structures, to maintain a high degree of autonomy; and be it further

*Resolved*, That the Task Force shall have as many as 24 members, appointed jointly by the Presiding Bishop and the President of the House of Deputies by September 30, 2012. The membership of the Task Force shall reflect the diversity of the Church, and shall include some persons with critical distance from the Church's institutional leadership; and be it further

*Resolved*, That, in order to be informed by the wisdom, expertise, and commitment of the whole body of the Church, the Task Force shall gather information and ideas from congregations, dioceses, and provinces, and other interested individuals and organizations, including those not often heard from; engage other resources to provide information and guidance; and shall invite all these constituencies to be joined in prayer as they engage in this common work of discernment; and be it further

*Resolved*, That the Task Force shall convene a special gathering to receive responses to the proposed recommendations to be brought forward to the 78th General convention, and shall invite to this gathering from each diocese at least a bishop, a lay deputy, a clerical deputy, and one person under the age of 35. It may also include representatives of institutions and communities (e.g., religious orders, seminaries, intentional communities); and be it further

*Resolved*, That the Task Force shall report to the whole Church frequently, and shall make its final report and recommendations to the Church by November 2014, along with the resolutions necessary to implement them, including proposed amendments to the Constitution and Canons of the Church; and be it further

*Resolved*, That the Joint Standing Committee on Program, Budget, and Finance consider adding \$400,000 to the 2013-2015 triennial budget to enable this Resolution to be implemented energetically and successfully, "...for surely I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope." (Jeremiah 29:11)

### **TREC's Membership**

Dr. Katy George, *Convener*  
 The Very Rev. Craig Loya, *Convener*  
 The Rev. Jennifer Adams  
 The Rev. Joseph Chambers  
 The Rev. Dr. Sathianathan Clarke  
 Canon Judith Conley  
 The Rt. Rev. Bishop Michael Curry  
 The Rt. Rev. C. Andrew Doyle  
 The Rev. Canon Marianne Ell  
 The Very Rev. Peter Elliott  
 Dr. Victor Feliberty-Ruberte  
 The Rev. Robert Anton Franken  
 The Rt. Rev. Mary Gray-Reeves  
 Mr. Ian Hallas (12/5/12-9/27/13)

Ms. Julia Ayala Harris  
 The Rev. Dr. Bradley Hauff  
 The Rev. Miguelina Howell  
 The Rev. Leng Lim  
 Mr. Thomas Little, Esq.  
 Ms. Sarah Miller  
 The Rev. Canon Kevin Nichols  
 The Rt. Rev. Sean Rowe  
 Ms. Margaret Shannon  
 Mr. T. Dennis Sullivan  
 Mr. Charles Wynder, Jr. (9/27/13-6/18/14)  
 Mr. Jonathan York  
 The Rev. Dr. Dwight Zscheile

### *Changes in Membership*

Ian Hallas resigned and was replaced by Charles Wynder, Jr. Charles Wynder, Jr. later resigned when he accepted his position with DFMS.

## Appendix 2: Church Engagement Process and Findings

TREC reached out to Episcopalians to find out what they want the Church to keep and what they want to change. We created an “engagement kit” to capture people’s feelings about the Church today and their dreams for its future.

Our aim was to use an open, welcoming, upbeat and stimulating approach to foster a culture of participation, engagement, and collaboration. We designed it to make it easy to facilitate the engagements; to participate; and to record the findings in a variety of settings with different group sizes and demographics, including language and literacy.

We reached out to a diverse group of people who represent today’s Church and the Church of 10 years from now; to opinion leaders; to influencers, including many who do not hold official positions; and to people who are active in the Church and those who are less active.

Between 1,500 and 2,000 Episcopalians participated online and in person, and individually and in groups. They included priests and deacons, vestries, seminary students, deans and faculties, and parishes meeting together. Members of the Task Force led many of the engagement sessions, and some groups held engagements without a TREC member.

As part of our engagement process, we asked four questions:

- 1. What are your favorite memories of the Church?
- 2. What is the one thing the Church should hold onto?
- 3. What is the one thing the Church should let go of?
- 4. Imagine that it is ten years in the future. Finish the sentence: “The thing that gives me the most joy about the Church these days is...”

We engaged Todd Combs, PhD, to compile and analyze the results of our Church engagement effort. He analyzed the findings using QSR International’s NVivo 10.

In the attached report, he summarizes the findings and their implications for the work of the Task Force.



# Reimagining the Episcopal Church

## Executive Summary

- ❖ This report summarizes members' in-person and online contributions from engagement in the Task Force for Reimagining the Episcopal Church.
- ❖ Members' favorite memories of the Church included feelings of love and community along with the liturgy, sense of tradition, and a joyful and comforting atmosphere.
- ❖ When asked about what the Church should hold on to, participants most frequently mentioned the liturgy, the Book of Common Prayer, the Eucharist, and other traditions of the Church.
- ❖ When asked about what the Church should let go of, parishioners most often felt that the hierarchical corporate structure and the size and bureaucracy of the Church and the general convention were too cumbersome.
- ❖ Many felt that what would bring them the most joy in the future with the Church would be belonging to a diverse community of faith that is also actively involved in the greater community through fellowship and outreach.
- ❖ Taken together, all the responses suggest that what members value most about the Episcopal Church are the people, the sense of community and inclusion, and liturgical traditions.

## Introduction

As a result of the 77<sup>th</sup> general convention, the Task Force for Reimagining the Episcopal Church was created to create a plan to reform the Church's structure, governance, and administration. In order to include the largest possible number of members in the discussion of how best to reorient the efforts and resources of the Church back toward engagement in its mission, the Task Force created a questionnaire to gain feedback from everyone. Members have participated individually and in groups in parishes around the nation as well as online at [www.reimagineyec.org](http://www.reimagineyec.org).

In all, there are four questions on the survey. 1) What are your favorite memories of the Church? 2a) "What is the one thing the Church should hold on to?" 2b) "What is the one thing the Church should let go of?" And 3) "Imagine it is 10 years in the future. Finish the sentence: The thing that gives me the most joy about the Church these days is..." This report compiles members' responses. It highlights the prevailing sentiments and themes contained in the responses to each question and presents a summary of the results. Taken together, all the responses suggest that members agree with the Task Force that the Church's structure has grown too large should be reformed, and – as seen in the cloud of concepts on the cover – what members value most about the Episcopal Church are the people, the sense of community and inclusion, and its liturgical traditions.

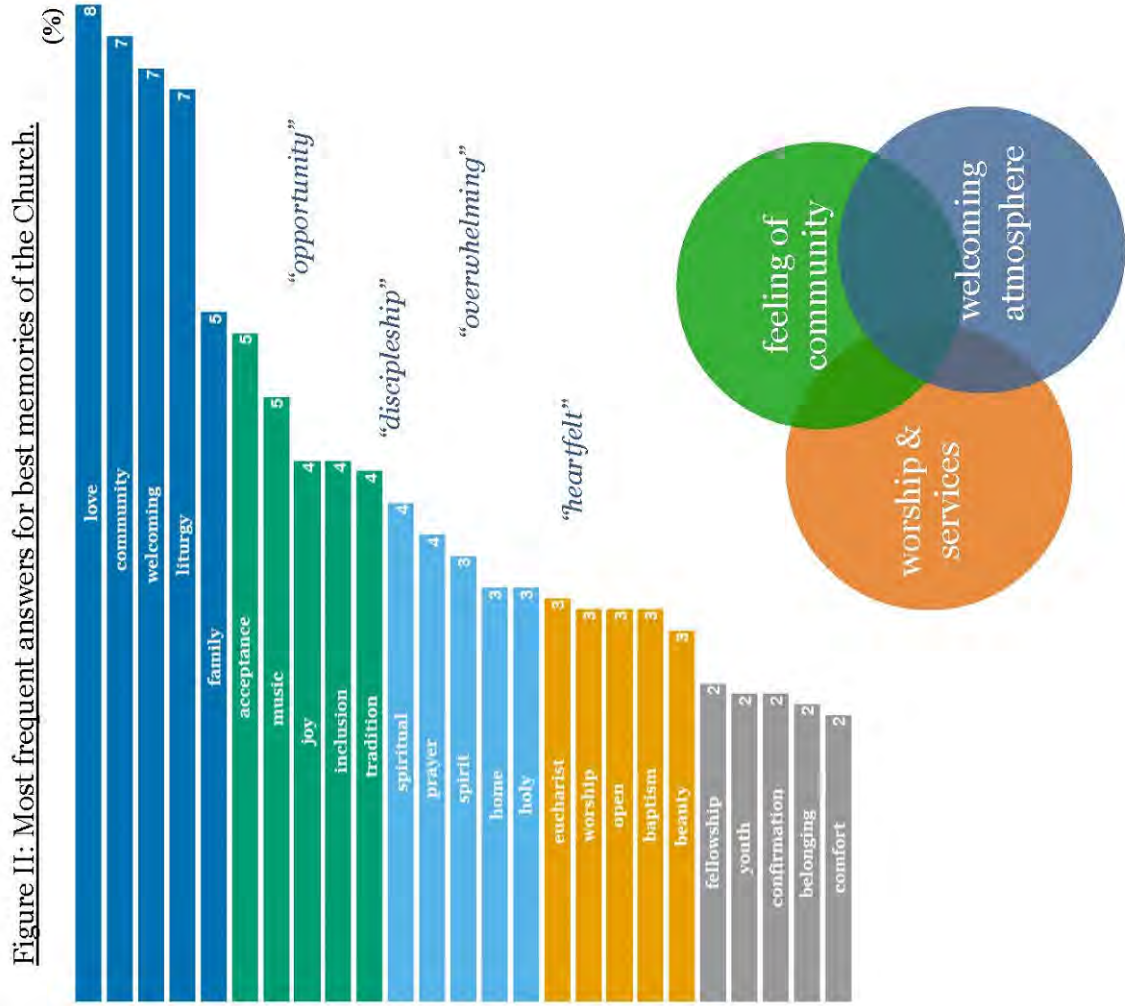
\*Cover graphic shows participants' favorite aspects of the Church, compiling the most popular responses to questions 1, 2a, & 3.





## Favorite memories of the Church

The responses to the question about memories produced many concepts. The top 25 are shown here and the numbers in the bars signify the percentage of responses in which each word was mentioned. (Note: these numbers will not sum to 100 as each response contains multiple concepts.) The top four answers – “love”, “community”, “welcoming”, and “liturgy” – were contained in about 30% of all the responses. The most frequently mentioned concepts shown here are representative of the whole in that they can loosely be grouped into a few non-mutually exclusive categories. Many suggested that the **feeling of community** is a favorite memory, such as “*acceptance*”, “*inclusion*”, “*fellowship*”, and “*home*”. Others recalled specific aspects of **worship and services** like the “*liturgy*”, the “*Eucharist*”, and “*baptism*.” Another category of memories evoked feelings of the **welcoming atmosphere** of the church: terms like “*joy*”, “*holy*”, “*comfort*”, and “*tradition*.”

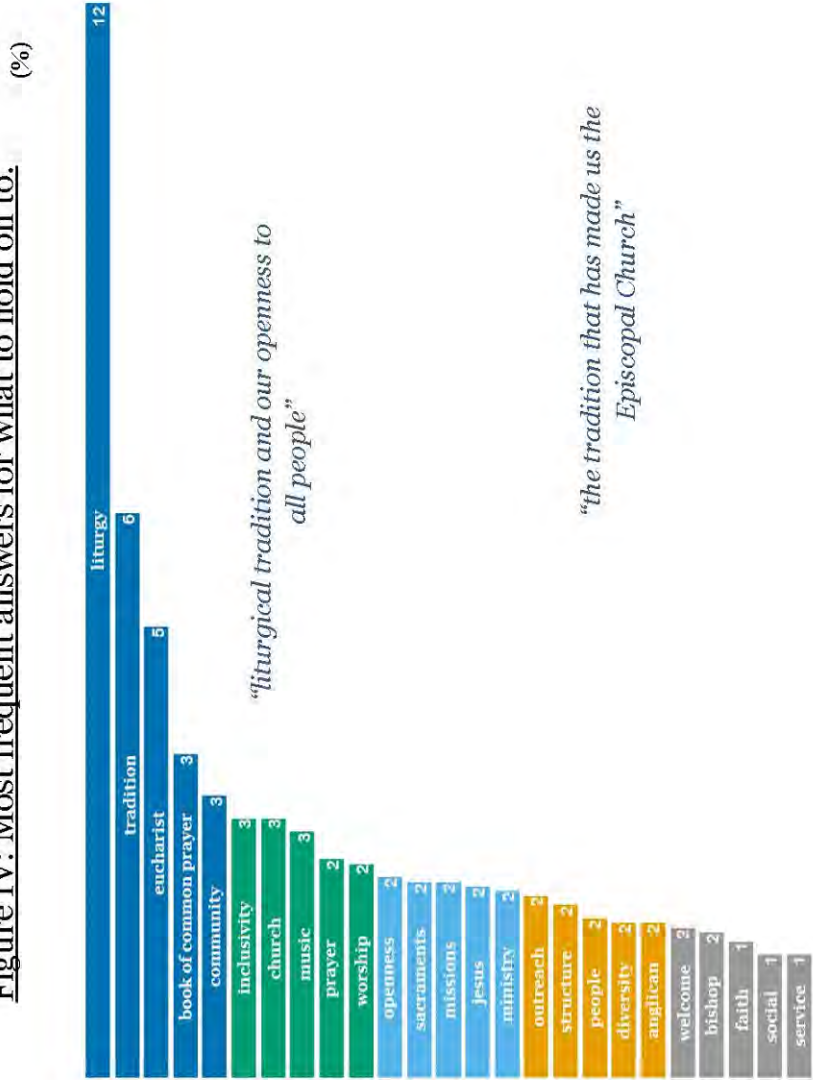




## What the Church should hold on to

In contrast to the preceding question about favorite memories for which the top responses were given with about the same frequency, the top response for question 2, **liturgy**, was given at least twice as often as any other answer. Many believe that the liturgy is the one thing the church should hold on to (Figure IV, here again the numbers in the bars are the percentages of responses in which each concept was included). And perhaps expectedly – many of the same concepts appear as did in the respondents’ favorite memories such as “*inclusivity*”, “*music*”, “*worship*”, and “*openness*.” When asked what the church should hold on to, three percent of members included the word “*church*” in their answer. The word tree in Figure V on the next page shows the context of these responses, which range from “dynamic creative liturgy – not always within the walls of a *church*” to “after *church* coffee hours.”

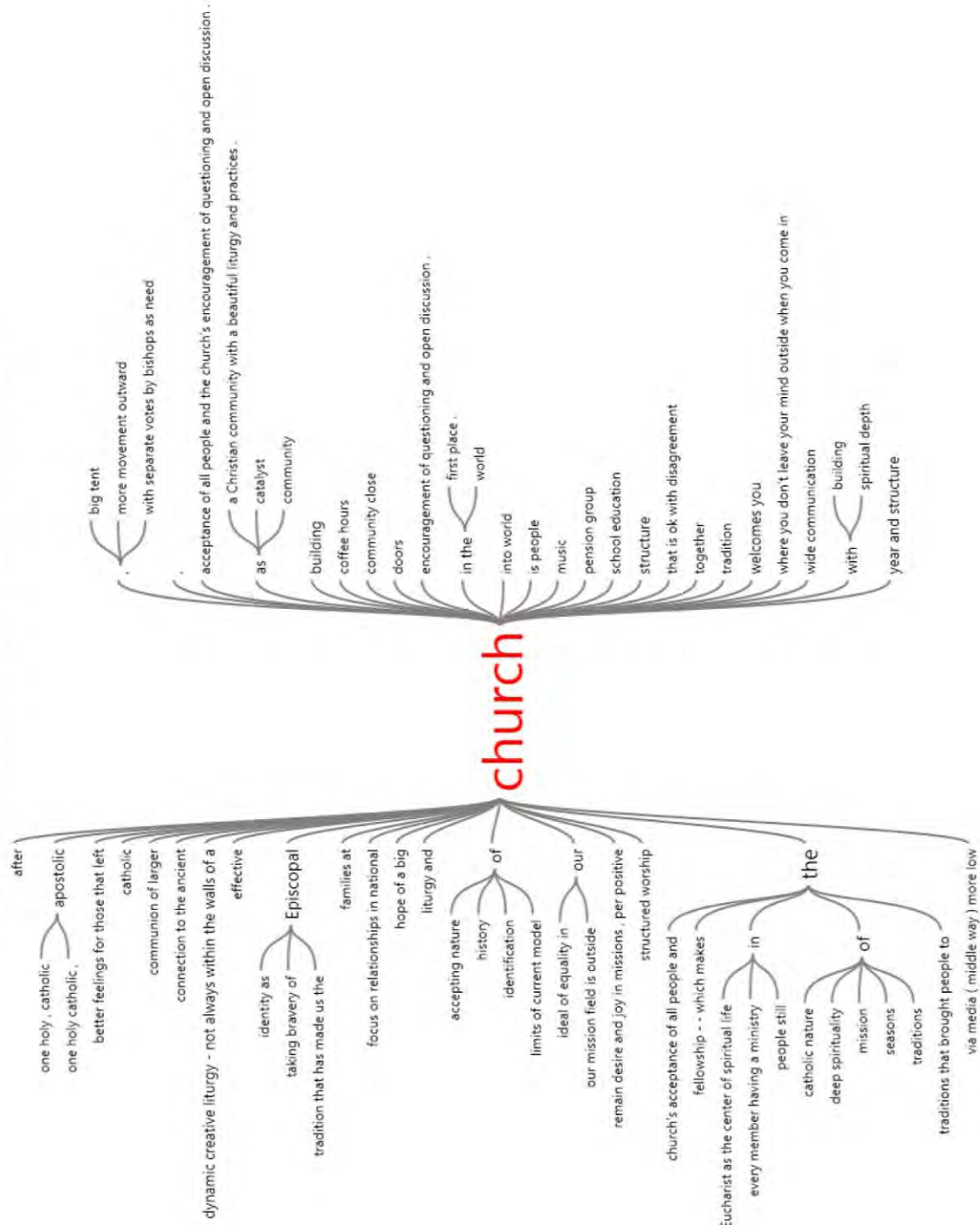
Figure IV: Most frequent answers for what to hold on to.



“importance of local ministry, mission, and outreach”

# What the Church should hold on to

Figure V. Context of responses including “church.”



## What the Church should let go of

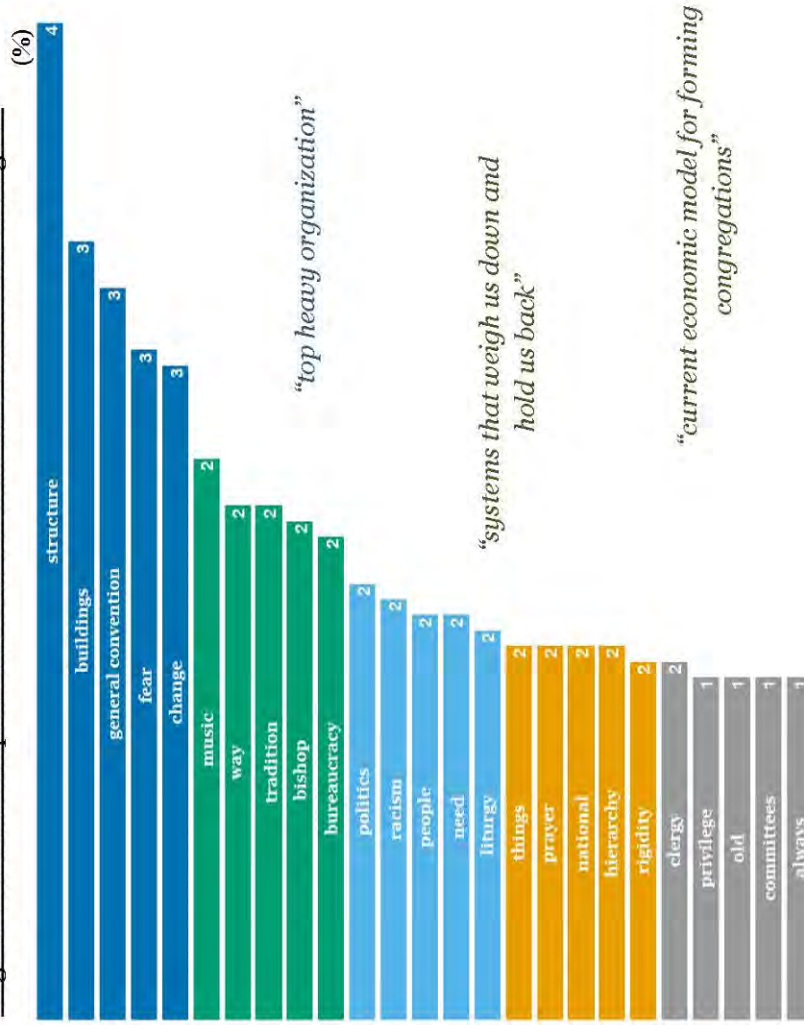
Question 2b asked what the church should let go of. Here, members mentioned **structure** more often than any other word. Many also cited the **general convention** or some characteristic of it as something the church should get rid of. Participants believed it is too long (“length of”, “overly long”), too expensive (“costly”, “wastefulness of”), and too large (“cumbersome”, “reduce size of the houses of”). Likewise, members thought that the **buildings** are too costly (“maintenance of”, “expensive”) and too numerous (“fixation with”, “[some have] tiny congregations”). Members also mentioned **fear** and **change** often and mostly together as “fear of change.” (See also Figures IX & X pages 10-11.)

Figure VI: What should the Church let go of?



## What the Church should let go of

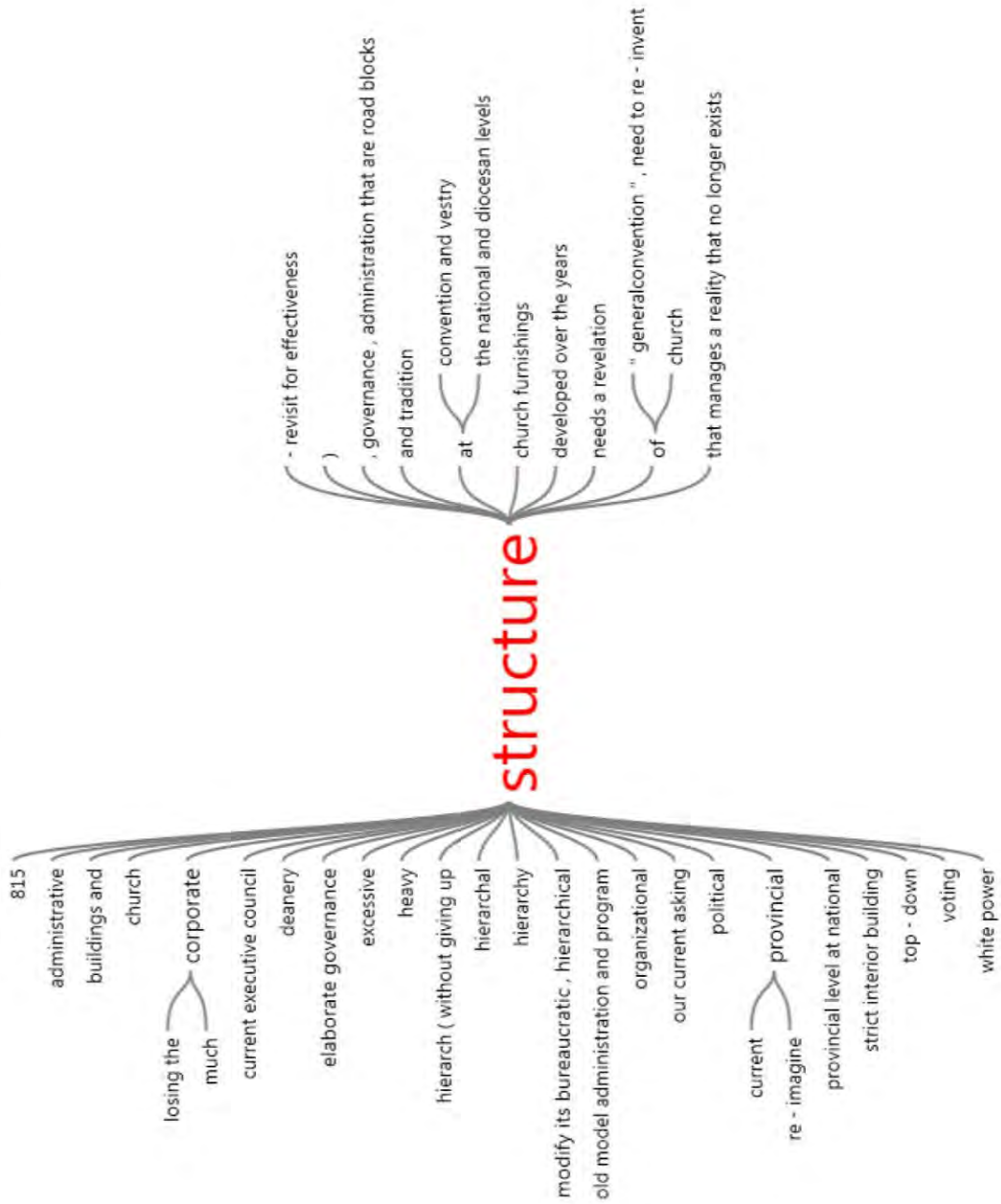
Figure VII: Most frequent answers for what the Church should let go of



Here again the most popular responses show that members believe that the organizational structure needs to be changed. Besides “structure”, words like “bureaucracy”, “hierarchy”, “politics”, and “committees” were among the most frequent responses. “Bishop” was also used in terms of organizational structure such as “CSO model for presiding bishop” and “reduce infrastructure around 815 and presiding bishop.” Figure VIII on the next page shows the context in which members mentioned “structure.” Parishioners found it “excessive”, answered that the “current executive council structure” should be let go, and said that the “structure needs a revelation.”

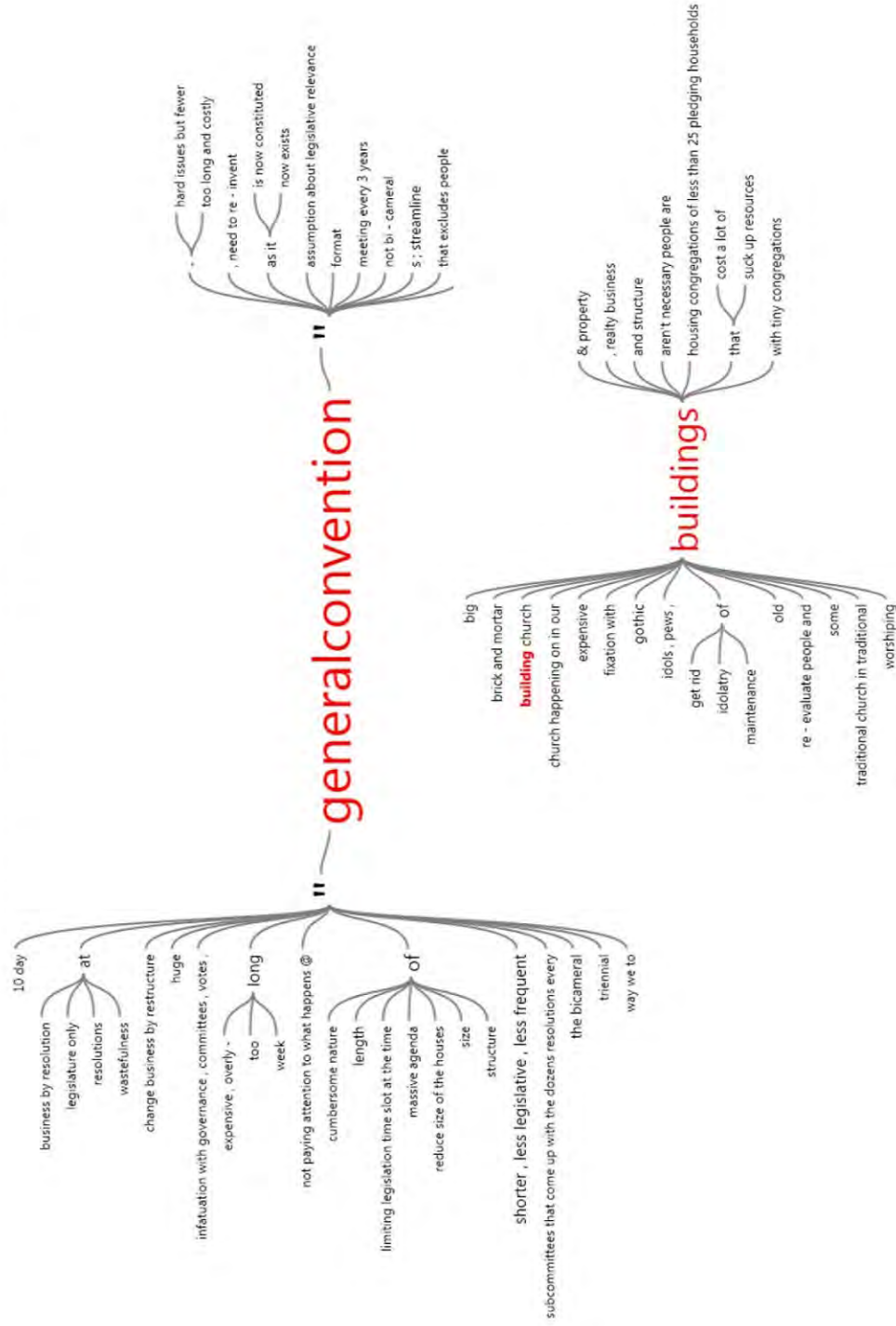
# What the Church should let go of

Figure VIII. Context of responses including “structure.”



# What the Church should let go of

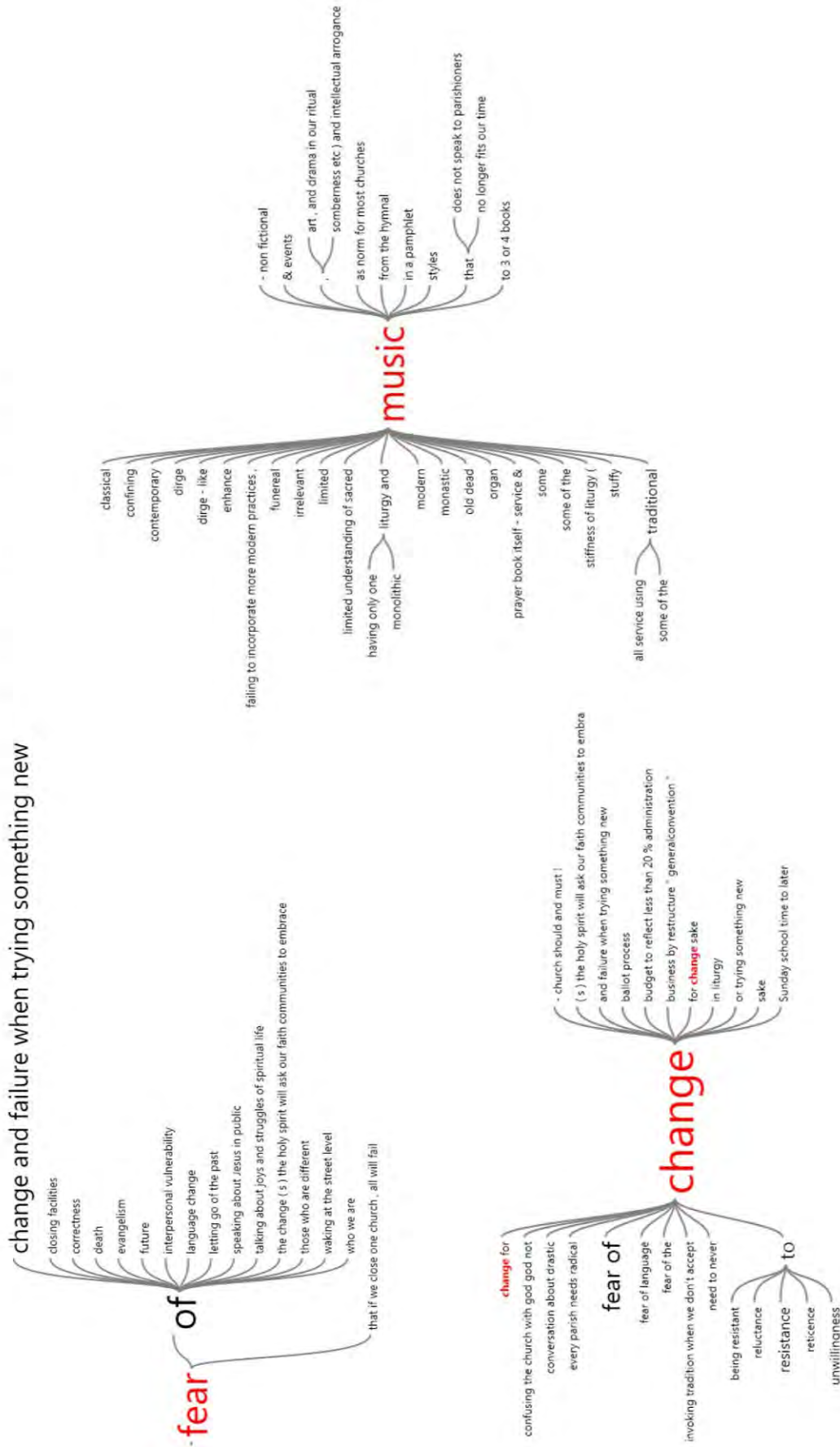
Figure IX. Context of responses including “general convention” and “buildings.”





# What the Church should let go of

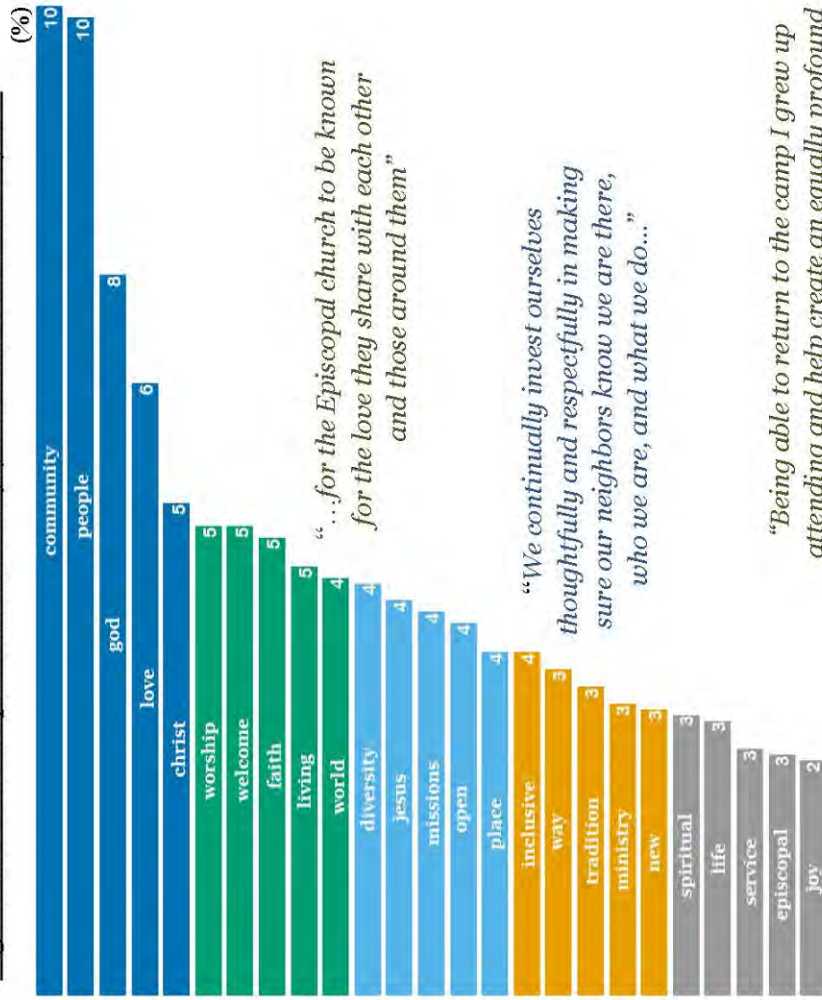
Figure X. Context of responses including “fear”, “change”, and “music.”





## My Church...10 years from now

Figure XII: Most frequent answers for joy from the Church in 10 years



Members were more united in their responses to the question about what would bring the most joy from the church in the future than any other question. Half of the answers (49%) contained one or more of the top seven concepts: “community”, “people”, “God”, “love”, “Christ”, “worship”, and “welcome.” As one would expect, many of these same concepts were shared in responses to question 1 about members’ favorite memories. By and large parishioners value the love and sense of community the church presents. They love the inclusive nature of the church, its missions, and ministry.

# My Church...10 years from now

The most popular concepts in the responses for the question of what would bring parishioners joy from the church in the next decade were “community” and “people.” Most of these responses fall into one of three overlapping groups.

## A Community of Faith

Many brought up the unity and sense of belonging they feel with fellow worshippers, for example:

- *“Belong to a **community** of love, tradition with compassion...”*
- *“Welcomes my family and I into their **community** without judgment. They allow me a place for my child to become her own person”*
- *“Really are a **community**. We participate in each other’s lives, through the good and the bad. We’re a family.”*

*“acceptance and loving **community** that I found over the course of my life through the church...”*

*“**community** of people I can lean on and I find peace there”*

*“Engaged in meeting needs of the **community** as the eyes, ears, hands and feet of Jesus in exciting ways...”*

## Outreach & Fellowship

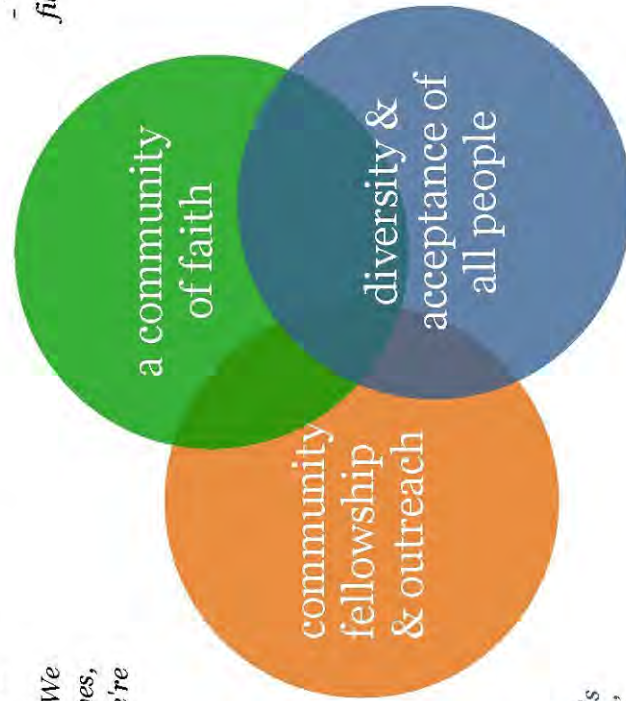
Others spoke of the connection and commitment to the greater community, like:

- *“Clear commitment to **community** in sacrament and hospitality”*
- *“responds to the needs of its people as well as the **people** outside the church”.*

## Diversity and Acceptance of All

And another group of members emphasized the diversity embraced by the church:

- *“...how able it is to support many different iterations of individual initiative and a plethora of expressions of faith and **community**”*
- *“a **community** of faith that includes all races and beliefs and welcomes change”*
- *“Vibrant, Christ-centered congregations filled with all sorts of **people**.”*



*“kaleidoscope of **people**”*

*“ministry is taken to the **people**”*

*“how welcoming the church has become, we now have **people** from all walks of life...”*

## Reimagining the Episcopal Church

### Notes

1. Word frequencies calculated by grouping stemmed words together and represented by most frequent iteration, for example entries for “love” and “loving” all tallied as “love.”
2. The numbers in all bar charts represent the percentage (rounded to the nearest whole number) of responses to each question in which concept occurred. Since all responses contain multiple terms, and since only top results are shown for each item, percentages do not add to 100.
3. For clarity, “Eucharist” and “communion” were both coded as “Eucharist” except for cases when “communion” was cited as “Anglican Communion” referring to the global polity.
4. Question one concerning best memories of the church asked for three responses. These were coded as separate entries, so the total number of responses was divided by three to calculate percentage of responses for Figure II.
5. In the responses for questions 2b (let go) and 3, the most frequent word was “church.” Each question asked about an aspect of the church – what should the church let go of & what will bring you the most joy from the church in 10 years – “church” was removed from the responses for analysis. This way the other top responses – i.e., “structure” for question 2 (let go) & “community” for question 3 could be highlighted as the particular aspects of the church respondents described.
6. Data were analyzed using QSR International’s NVivo 10, R: A Language and Environment for Statistical Computing from the R Foundation for Statistical Computing, and the R package “wordcloud” from Ian Fellows.
7. Prepared by Todd Combs, Ph.D. [toddcombs13@gmail.com](mailto:toddcombs13@gmail.com)

### **Appendix 3: Resolutions and Explanations to Support an Agenda of Church Reimagination**

We believe that to adapt to today’s needs and to strengthen its ability to serve God’s mission as Luke 10 describes, The Episcopal Church must address how we “do the work we have been given to do” at every level — congregational, diocesan, and church-wide, as well as through individual spiritual practice and discipleship.

We believe that the Church must reconsider many of its current practices around congregational and diocesan collaboration, congregational and leadership development, clergy formation, Church Pension Fund incentives and initiatives, and the use of our sacred buildings.

We debated whether to present these recommendations to the Church in resolution form. They are in many ways more comprehensive than resolutions of General Convention tend to be. They integrate governance and culture, administration and identity, and polity and practice. They are also, by virtue of their breadth, less detailed than some might wish.

However, we believe that the Church needs to address these issues directly and immediately, and the legislative process is the primary means by which we as The Episcopal Church endorse and fund our communal priorities and directions. The “perfecting” of resolutions is a process shared by members of the Church who assemble as our General Convention, bishops, clergy, and lay people from around the whole Church.

We recognize that what we as TREC present is only one step in this church-wide conversation and process. And so we put forth three resolutions for General Convention which, if embraced as critical issues and adopted for further action, will engage the Church at every level in faithful, constructive conversation and planning.

We believe this work is at the heart of the reimagination to which we have been called as a task force. In turn, our call to the Church is to come together in collective and constructive reimagination around three topics:

- Restructuring for spiritual encounter;
- Reimagining dioceses, bishops, and General Convention;
- Restructuring assets in service of God’s mission in the future.

We have designed these resolutions to call all parts of the Church — not just the central governance structures — to engagement. Change around these issues will be both technical and adaptive based on specific canonical recommendations we have included, and on experimentation and learning at local, diocesan, and church-wide levels. They propose renewed ways not only of speaking to the world, but of being together, and progress will be driven by a commitment to collaboration across structures that may have no formal connectivity today. Therefore, these resolutions are:

- Holistic, systemic, intentionally overlapping, and designed to catalyze discussion and experimentation by all parts of the Church in the work of problem-solving, resource-sharing, mutual burden-bearing, and mission-making.
- Direct yet open — a combination of specific and general recommendations. We have included specific recommendations where we have them, but believe that “filling in the gaps” is the work of a larger whole for collectively addressing the challenges and opportunities before us.

## PROPOSED RESOLUTIONS

### A001: RESTRUCTURE FOR SPIRITUAL ENCOUNTER

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention urge Episcopal seminaries to work collectively in creating, nurturing, and developing a culture of collaboration among them that results in: new structures; new curricula; new degrees beyond the traditional MDiv; partnerships and practices on the academic, departmental, and inter-seminary levels; tangible, measurable evidence that seminary trained leaders (lay and ordained) have the spiritual formation, skill sets, and intellectual aptitude to engage the world and to transform and lead The Episcopal Church, looking beyond competency in the academic areas defined by canon; standards of accountability, reporting, and mutual ministry reviews at all levels; and Episcopal seminaries' reportage of their progress to Executive Council and to each succeeding General Convention; and be it further

*Resolved*, That Diocesan Councils and Commissions on Ministry, in collaboration with their Bishop, encourage and support diverse ways for ordained clergy to make a living inside and outside the Church; and be it further

*Resolved*, That the Executive Council study the issue of clergy compensation; and be it further

*Resolved*, That the Trustees of the Church Pension Fund study the following and report to the 79th General Convention: the current pension offerings and how well they serve the Church; the incentives in the current pension system; pension plan opportunities available to Episcopal clergy working in the secular world who are providing non-stipendiary service to The Episcopal Church; compensation models and pension benefits that may not be adequate or may be just in certain areas of the Church, particularly in dioceses outside the U.S.; and be it further

*Resolved*, That the Domestic and Foreign Missionary Society develop a network to help Episcopal congregations, including clergy, vestry, organist, musical, lay, and other liturgical leaders, to become skilled in creating, nurturing, and developing spaces and moments for spiritual encounters that transform lives and unjust structures; and to have partnerships and practices with other congregations to become excellent stewards of spiritual, financial, real estate, and community resources; and to report their progress and learning annually to their Diocesan Convention/Council and Bishop.

## EXPLANATION

The Psalmist says: "Taste and see that the Lord is good." (34:8) At the heart of being a Christian is this continual experience of God that changes our lives and spurs us to just actions toward others (as in the Five Marks of Mission). TREC's engagement report substantiates this: many Episcopalians' strongest memory of the Church is as a place where God's love is known. The sources of this experience vary from inclusion to liturgy, music, and so on. At the heart of the Church's mission is spiritual encounter with God that transforms lives. It can be said that Episcopalians understand this.

So why are we facing enormous challenges?

First, we Episcopalians, like many other Christians, are often distracted in our focus. We do not tend to put our life in God through Christ consistently front and center in all that we do, or to do it with consistent effectiveness. In contemporary society, people are hungry for spiritual encounters; a sense of awe; genuine community; authentic witness; and practices to live-loving, faithful and just lives. They are also less and less inclined to approach the Church or any organized religion to find these things.

The system of the institutional Church across denominations is also now being challenged — fewer people go to church regularly on Sunday, some because they do not find the kinds of connections with others or God that nourish or bind them to their fellow parishioners as committed members. This is true of all age groups, not just people in their 20s and 30s.

With the decline in membership and rising costs of maintaining staff and buildings, we may no longer be able to support the traditional model of one clergy, one parish. Many church buildings are unsustainable cost centers. To add to the problems, expensive seminary tuition leads to long-term debt for many clergy.

As the model of the past century becomes outmoded, we must be more inventive around how we conceive of, select, prepare, train, and support our lay and ordained leadership. (We believe that institutions and programs training liturgists and musicians face similar challenges.) Many clergy are neither prepared nor equipped to address the complex issues of our times that impact spiritual health and identity, or our viability as an institution. In response, some dioceses are exploring and implementing creative models for clergy and lay leadership and employment.

Newer clergy cannot assume that they will be able to make a sustainable living in the Church. Instead, they must have many skills they can use in both church and secular environments. That multiplicity of skills will also benefit the life of the Church. Such clergy will be more confident of, and responsible for, their financial prospects. They will be freer to choose ministries that fit their calling, and be free to work in new ways. Seminary training processes should continue to be reformed. Changes may mean the creation of degrees or programs that speak broadly to the needs of the Church and to the skills and gifts needed for leadership in today's world. We also encourage seminaries to speak in new ways to society at large and to better meet the educational and spiritual needs of non-church people.

The Church Pension Group must then adapt to support these new, emerging realities and needs. It is essential that the Church adapt theological education, pension benefits, and related processes to embrace innovation, creativity, and overall growth.

Commissions on Ministry must likewise re-envision the ordination process and consider the broader ministry needs of today's Church, so that they do not enact the requirements and processes of a different era and miss the opportunities of the new. Our committed lay people may be our greatest untapped resource. We must find ways to equip some of them to perform roles that in the past have been assigned to the clergy.

What if we make these changes and nothing happens? We are encouraged by the story of Jacob's ladder, and that all truthful and honest striving to transform will be met by God with a blessing. "I will not let you go, unless you bless me." (Genesis 32:28) The institutional changes we seek in our living system will require will, humility, sacrifice, devotion, as well as timely action. The exercise of these alone will be transformational and will bring us into an encounter with the God of Jacob and Israel.

A002: REIMAGINE DIOCESES, BISHOPS, AND GENERAL CONVENTION

**A. Reimagine Governance Structures**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention adopt a unicameral model of governance as outlined in amendments to Article I, Sections 1-6 of the Constitution as proposed in TREC's final Report; and be it further

*Resolved*, That the bishops of The Episcopal Church create, nurture, and develop a culture of collaboration that results in: new structures, partnerships, and practices on the interpersonal, group, and organizational levels; measurable, tangible outcomes of performance; standards of accountability, reporting and mutual ministry reviews at all levels (bishops, clergy, diocesan bodies); frank discussion on the number and size of



our dioceses and whether change is needed; and reportage on their progress to each succeeding General Convention; and be it further

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

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

*Resolved*, That the diocesan assessment percentage be lowered while making it canonically mandatory (with means for pastoral exception) for each diocese to meet that assessment.

### **B. Make Constitutional Changes to Achieve a Unicameral Legislative Body**

*Resolved*, the House of \_\_\_\_\_ concurring, That Article I, Sections 1-6 of the Constitution be stricken in their entirety and replaced with the following:

#### **The Episcopal Church Constitution, ARTICLE I**

**Sec. 1.** There shall be a General Convention of this Church in which all members shall meet together as one body. Each of the three orders — Bishop, Clerical, and Lay — may meet and deliberate separately except as the constitution, canon, or rule of order may otherwise provide. On any matter requiring a vote, any order may choose to deliberate and/or vote separately. In all deliberations, freedom of debate shall be allowed, subject to such rules of order as may be adopted to assure fairness.

**Sec. 2.** Each Bishop of this Church having jurisdiction, every Bishop Coadjutor, and every Suffragan Bishop shall have a seat and a vote in the General Convention and any matter acted upon separately by the Order of Bishops. A majority of all Bishops and Deputies entitled to vote shall be necessary to constitute a quorum for the transaction of General Convention business.

**Sec. 3.** At the General Convention next before the expiration of the term of office of the Presiding Bishop, the General Convention shall elect one of the Bishops of this Church having jurisdiction as the Presiding Bishop of the Church. The Presiding Bishop of the Church shall serve as a co-chair of General Convention. Candidates for the Presiding Bishop shall be elected by the General Convention, by concurrent vote of each order. The affirmative vote of a majority of the deputies of each order shall be required for the election of a Presiding Bishop. The term and tenure of office and duties and particulars of the election not inconsistent with the preceding provisions shall be prescribed by the Canons of the General Convention. If the Presiding Bishop of the Church shall resign the office as such, or if by reason of infirmity shall become unable to serve, or in case of death, the Bishop who, according to the Rules of the Order of Bishops, becomes its Presiding Officer, shall (unless the date of the next General Convention is within three months) immediately call a special meeting of the Convocation of Bishops to elect a member thereof to be the Presiding Bishop. The certificate of election on the part of the Convocation of Bishops shall be sent by the Presiding Officer to the Standing Committees of the several dioceses, and if a majority of the Standing Committees of the dioceses shall concur in the election, the Bishop elected shall become the Presiding Bishop of the Church.

**Sec. 4.** In addition, the Church in each diocese that has been admitted to union with the General Convention, each area Mission established as provided by Article VI, and the Convocation of Episcopal Churches in Europe, shall be entitled to representation in the General Convention by three ordained persons, priests, or

deacons (“Clergy”) canonically resident in the diocese, and not more than three lay persons, confirmed adult communicants of this Church, in good standing in the diocese but not necessarily domiciled in the diocese; but the General Convention by Canon may reduce the representation to not fewer than two deputies in each order. Each diocese, and the Convocation of Episcopal Churches in Europe, shall prescribe the manner in which its deputies shall be chosen. To constitute a quorum for the transaction of business, the Clerical order shall be represented by at least one deputy in each of a majority of the dioceses entitled to representation, and the Lay order shall likewise be represented by at least one deputy in each of a majority of the dioceses entitled to representation.

**Sec. 5.** The vote on all questions that come before the General Convention shall be governed by the following provisions, supplemented by such procedural provisions as the General Convention may adopt in its Rules of Order: Unless a greater vote on any question is required by this Constitution or by the Canons in cases not specifically dealt with by this Constitution, voting by orders shall not be required, and the affirmative vote of a majority of all Deputies present and voting shall suffice to carry any question.

When voting by orders is required, unless a greater vote on any question is required by this Constitution or by the Canons in cases not specifically dealt with by this Constitution, the affirmative vote of a majority of all Deputies of each order (clergy, lay, and Bishops) present and voting shall suffice to carry any question. A vote by orders on any question shall be taken if required for that question by this Constitution or by the Canons or if clerical, lay, or Bishop representation from three or more separate dioceses shall so request at the time of the call for the vote on that question. In voting by orders, the vote of each order shall be counted separately, each order in each diocese shall have one vote, and a vote in the affirmative by an order in a diocese shall require the affirmative vote of a majority of the Deputies present in that order in that diocese. To carry in the affirmative any question being voted on by orders requires concurrence in the affirmative by all orders and, unless a greater vote is required by this Constitution or by the Canons in cases not specifically dealt with by this Constitution, concurrence in the affirmative by an order requires the affirmative vote in that order by a majority of the dioceses present in that order.

**Sec. 6.** At the General Convention, a majority vote of those Deputies present, even though less than a quorum, may adjourn from day to day.

#### EXPLANATION

Our history and heritage, as The Episcopal Church, have led us to create governance structures that allow dioceses, parishes, seminaries, and other institutions to function in relatively independent, self-sufficient, and self-focused ways. Politically and governmentally, The Episcopal Church functions as discrete units with checks and balances, yet theologically, we are one Body, and as Christians, we are called to the Work of being one Body.

In interviews with church leaders, TREC found that several of their concerns involved the challenges faced by dioceses and the need for TEC to more directly address issues of diocesan sustainability, vitality, accountability, and the need for collaboration in areas administrative, financial, or structural.

Faithful ministry and mission are underway in dioceses small and large throughout the Church. Neither the size nor the number of dioceses is the core issue. The core problem appears to be an inability to resolve inefficiencies or incapacities that could be readily addressed by intentionally working together, by living as one Body beyond the diocesan level. We have found that one of the most significant church-wide challenges is that member dioceses, while perhaps being vibrant locally, and even active independently in mission beyond their own geographic bounds, are neither consistently engaged with nor committed to the work of being one with each other.

Moreover, when opportunities arise to merge, stand in solidarity, or codify collaboration, some dioceses (including Standing Committees), or even church-wide leaders, have chosen to remain entirely independent, even when this does not appear to be the best use of energy and resources.

It is also evident that the historical and current tensions between the House of Bishops and House of Deputies at times inhibit our potential to flourish.

Lack of collaboration will remain a stumbling block to the health and Christian witness of each diocese and that of The Episcopal Church unless we make significant changes to our models and ways of operating. We must go beyond collaboration as discussion — which is the first step — to develop collaboration into joint action, experiments, innovations, commitments, practices, and structures. We realize that this is happening in some places. We also believe that a widespread culture of collaboration is what the Church desperately needs.

Therefore, we encourage means by which dioceses are stretched beyond their geographic boundaries and into full participation in the larger Body, starting with a renewed approach to the episcopate and a new model for being General Convention.

General Convention is the embodiment of The Episcopal Church gathered as one Body for purposes of prayer, discernment, celebration, and decision-making. We value the checks and balances provided in our current system, yet we believe that a unicameral model with the opportunity for orders to meet separately, and at times to vote by orders, will best forward our experience and practice of being one Body.

This resolution would convert the current bicameral legislative body (House of Deputies, House of Bishops) to a unicameral body to promote shared discussion and consensus-building among all three Orders (while maintaining the identities of the Orders and their ability to vote by Orders), and to avoid the delays and complications inherent in moving legislation between two houses. The expectation is that this and other improvements, some of which are already in progress under the leadership of the presiding officers, will help the Church conduct all legislative business more efficiently and effectively, and likely more quickly.

Bishops must play a lead role in making collaboration possible. They have a particular calling with regard to maintaining the unity of the Church and therefore need to model this unity not only by gathering together with one another, but also by leading the Church in practices that better support a church-wide culture of solidarity, burden-sharing, mission, and resources.

While representative of our greater unity, the current House of Bishops is one of the least diverse bodies in the whole Church — not only in demographics, but also in skills and life experience. Its makeup does not reflect the Church or society. The search and election process needs to be revised to yield a spiritually discerned, qualified, and diverse order. These processes are also expensive relative to outcomes, inconsistently implemented, and oftentimes fail to attract and capture many of the key skills required by the demands of today's episcopate. It may be that no search process will be adequate; as such, a stronger formation process is called for so that bishops can have the support, training, mentoring, coaching, and other supplemental developmental activities needed for spiritual, adaptive (and not just technical) leadership in difficult times.

**A003: RESTRUCTURE ASSETS IN SERVICE OF GOD'S MISSION IN THE FUTURE**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 78th General Convention direct every diocese to develop a theology of sacredly inclusive use of space that is adaptive and generative financially and spiritually; and be it further

*Resolved*, That the Presiding Officers, in consultation with Executive Council, convene regional consultative groups of professionals such as developers, financiers, architects, designers, community organizers, urban planners, artists, social entrepreneurs, and lawyers to serve as a resource for congregations seeking to re-envision their space and its possible uses, with an eye for demographic changes and trends in their region, and that \$200,000 be allotted for this purpose; and be it further

*Resolved*, That Bishops, Deans, Chapters, Rectors, and Vestries work collaboratively with congregational and community partners, and that every Episcopal cathedral, congregation, religious community, and institution work to re-envision their purpose in a spiritually hungry, community-seeking, and contemporary culture, considering especially the potential for full-scale community involvement in the use of its space and its strategic role in their context at large; and be it further

*Resolved*, That the Standing Committees of each diocese create standards for intervention and endowment spending policies; and designate Future Generation Funds to be good stewards of God's gifts, while caring for generations yet to come.

#### EXPLANATION

Throughout The Episcopal Church, we have tremendous monetary, real estate, and building resources. Our buildings are some of the most beautiful yet underutilized spaces. While worship services offer one of many expressions of the holy use of buildings, many of our buildings, even in viable and vibrant parishes, are empty much of the week.

Financial pressures have in some places led to the depletion of endowment funds solely for building maintenance or operational purposes. These same pressures have led to the sale of buildings and lands while not changing any of our fundamental business or ministry models, even while groups within our larger communities need safe, beautiful, dependable, loving, creative, sacred, tax-free, available spaces for gathering. The single most unused assets in TEC are our buildings, many of which are in areas where real estate needs are enormous and even lucrative.

We should be incredulous that our buildings are often empty — not just of members, but of any other users. We need to tap our Anglican understanding of incarnation, so that not just formally religious things are sacred, but so that other activities too can become sacred and sanctified, and benefit from being present in church buildings. With such a new attitude, we can then seize opportunities for how our spaces can be used for a whole host of heretofore unconsidered activities — activities of work, play, learning, shelter, and respite that the communities around us need and want. In our generosity, we can be generative.

Our buildings and properties can turn the tide of red ink if we adopt a new theology of sacredly inclusive space that seeks to be generous and generative. We encourage the stewards of these spaces to start with a commitment to let the entire church space be used for a wider variety of purposes that are consistent with our values as Christians. Further back in history, the parish, monastery, and cathedral were the centers of community life and were used for worship, commerce, refuge, trial court, school, theatre, hospital, burial ground, and more.

Several Native American traditions encourage leaders to make every decision with an eye to the welfare and well-being of generations to come, up to the seventh generation. This mode of thinking is not about scenario planning or plain stewardship. Rather, and in Christian terms, it thinks seriously about the future as deeply alive, because God's Mission in the future is alive. But that seventh generation is impacted by our decisions today about how we use, care for, and grow resources of land, buildings, and money. Selling buildings and consuming endowments to provide operational expenses is using the future to pay for the present.

Instead, like grandparents who sacrifice in the present by investing in education funds for their grandchildren, we ask that TEC look to the future. Organizational entities that have no new viable business or ministry models except consumption of accumulated resources must be recognized as having run out of good ideas, leadership, or opportunities. They can be encouraged to embrace a healthy process of dying, so that their deaths plant the seeds of resurrection for other lives of faith.

In this respect, dioceses can explore creating Future Funds or Land Trusts out of these closures or bequests such that these cannot be used now, but can be unlocked only at a future date by a new generation.

**Appendix 4: Who We Are as an Episcopal Church, What We Want to Uphold, and the Role of the Church-wide Structure**

The way we organize the Church is an expression of our identity — a communal expression of living out the Way of Jesus in the power of the Spirit. Over the centuries, our values have come to shape together a distinctly Episcopal way of being Christian. They include:

*Breadth and expansiveness:* We value a spectrum of Christian belief and practice within the “ordered freedom” of Prayer Book liturgy. We embrace the Anglican ideal of holding together multiple perspectives within one community of faith.

*An incarnational view of human life:* The incarnation represents God’s definitive “yes” to human life, experience, and culture. Every local culture can bear (and distort) God’s life, and the Church must take shape within those cultures to be the body of Christ.

*The way we organize the Church is an expression of our identity, a communal expression of living out the Way of Jesus in the power of the Spirit.*

*A sacramental view of Christian life:* Episcopalians understand the sacraments of Baptism and Eucharist as touchstones for the Church’s identity and witness, as they represent God coming to us in the ordinary stuff of the world: water, bread, and wine).

*The arts, liturgy, and mystery:* We believe that we can express the sacred through the arts and music.

*Social engagement and prophetic dissent:* We aspire to be fully inclusive and to strengthen society in Christ’s name with grace, mercy, forgiveness, justice, and reconciliation for all people and for God’s creation. The Gospel calls us to dissent from predominant patterns and structures in the world.

*Continuity and change:* In our commitment to the incarnation, we seek to uphold classical Christian faith but to adapt to historical change.

These elements of identity can give us to power to renew our mission and vitality in the 21st century. The reform and renewal underway must take seriously these elements of who we are, even as we make changes for our future.

As we spoke with thousands of Episcopalians over the last two years, a few ideas rang like bells in nearly every conversation. We all share an enduring love for the Church and its unique way of creating Christ-centered community and mission. We share a compassion for every human being, which we demonstrate in many ways, such as our inclusiveness.

Our faith centers on the Bible, of course. The Book of Common Prayer and the beauty and mystery of our liturgy bind us together around the world and through the ages. We love the Eucharist and baptism. We treasure the pageantry, beauty, and music of the Church. We consider our Anglican relationships and traditions to be essential to what it means to be Episcopalian.

We all expect to be free to ask questions and disagree without splintering endlessly, and we all want to be able to try some new things without having to give up all of the old ones.

The members of the Task Force believe that the Church can and must preserve all of these great strengths — along with its ability to evolve. Like every other long-lived organization, the Church has been able to make fundamental changes throughout its history.

We believe that this flexibility — the capacity and willingness to take a clear-eyed look at who we are and to decide together where we want to go — is something the Church must preserve if it is to grow and thrive into the 22nd century and beyond.

However, to make the kind of transformation necessary to participate in God’s mission in a faithful and life-giving way in a changing world, we believe that the Church should become less of a hierarchy and more of what we call a “network.”

This evolution will have profound implications for roles, culture, decision-making processes, and leadership itself. For example, we aim to more clearly define the role of the Presiding Bishop while decentralizing more decision-making and getting more input from the laity and minority voices.

While our recommendations represent real change, we believe they are in keeping with the evolution that has occurred historically around our church governance and structures. Having researched this history, we recommend four clear roles for church-wide structure in the 21st century:

*Catalyst:* The church-wide organization should inspire and provoke all members of the Church to live fully into its mission of “restoring all people to unity with God and one another in Christ” (BCP, p. 855). As a catalyst, the Church can call all the baptized to live into the fullness of the Baptismal Covenant and interpret the realities of the world in light of the gospel, calling the world to justice and peace.

*Connector:* The church-wide organization should establish and maintain relationships among its member communities and constituents to cultivate Episcopal identity, magnify the mission impact of local communities by connecting them to each other, and facilitate the sharing of ideas and learning across the Episcopal and broader Anglican networks.

This would include representing The Episcopal Church in the Anglican Communion, forging ecumenical relationships and alliances, maintaining the Church’s institutional history through the Church Archives, and fostering communication across the Church around new ideas, learning, and opportunities for collaboration.

*Capability-BUILDER:* The church-wide organization should help leadership develop the critical skills necessary for individual and community-wide Christian formation in 21st-century contexts. The organization should also ensure that the Church is a learning organization — improving after each success and failure across the Church and rapidly sharing lessons learned across the Church network.

Essential capabilities today include skills in ministry, community organization, reviving congregations, planting congregations, multicultural leadership, evangelism, Christian formation, and reaching new generations and new populations. Most of the expertise in these areas is found at the grassroots level, but the church-wide function can foster mutual learning, especially peer-to-peer. For example, the Church could fund experts to support targeted training and professional development around shared needs, and evolve expectations and requirements for clergy leadership.

*Convener:* The church-wide organization should assemble the Church in traditional and non-traditional ways for governance and as a missionary convocation. The organization should also convene the Church with the broader Anglican Communion, with ecumenical church partners, and with other potential partners and collaborators in proclaiming Christ’s Gospel and living the Five Marks of Mission. For example, the Church could convene a General Missionary Convocation both in person and virtually, potentially concurrent with General Convention.

**Appendix 5: Resolutions to Amend Canons to Implement Proposed Changes**

## A004: RESTRUCTURE EXECUTIVE COUNCIL

Resolved, the House of \_\_\_\_\_ concurring, That Title I, Canon 4, Sections 1-8, be stricken in their entirety and replaced to read as follows:

**Title I, CANON 4: Of the Executive Council**

**Sec. 1 (a)** There shall be an Executive Council of the General Convention (which Council shall generally be called simply the Executive Council, or the Council) whose duty it shall be to oversee the execution of the program and policies adopted by the General Convention. As Executive Council, and also in its capacity as Board of Directors of the Domestic and Foreign Missionary Society, the Executive Council shall have oversight of the work done by the Presiding Bishop and the Society. The Executive Council shall also have oversight responsibility for the work of the Office of General Convention, and the Executive Officer of General Convention shall report directly to the Executive Council. In such capacities, the Council shall have oversight responsibility for the disposition of the moneys and other property of the Domestic and Foreign Missionary Society in accordance with the provisions of this Canon and the resolutions, orders, and budgets adopted or approved by the General Convention. It shall also have oversight responsibility for the disposition of the moneys of the Office of General Convention. The Council shall adopt procedures it deems appropriate for approval of expenditures by the Domestic and Foreign Missionary Society and the Office of General Convention.

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

**(c)** The Executive Council shall be composed of 19 members elected by the General Convention, of whom 10 shall be elected at General Convention in even-numbered years, and nine shall be elected at General Convention in odd-numbered years. The Executive Council shall include one elected member from each of the nine Provinces; at least three Bishops, five presbyters or deacons, and eleven lay persons; and the rules of order of the General Convention shall structure the voting for Council members so as to assure that this minimum distribution of Provinces and Orders is achieved. The Presiding Bishop and the Presiding Deputy shall be *ex officio* members on the Executive Council, with seat, voice, and vote.

**(d)** The Executive Council shall appoint a Governance Committee from among its members to assist the Council to (i) advise the Standing Committee on Search and Nominations annually in November on what skills are needed on the Executive Council to enable it to function with maximum effectiveness, and whether those skills are at that time represented on the Executive Council, and (ii) create a charter that describes the skills requisite for service on the Executive Council.

**(e)** The Executive Council members elected by General Convention shall be elected from among candidates nominated by the Joint Standing Committee on Nominations established by the Rules of Order. The Synod of each Province shall, within six months before General Convention, submit to the Joint Standing Committee on Nominations the names of up to six persons from its Province, including at least one from each of the three Orders, to be considered as a nominee for Executive Council. In considering candidates for nomination,



the Standing Committee shall consider the skills, gifts, and experience needed by the Executive Council in discharging its responsibilities under this Canon; the value of cultural and geographic diversity on the Council; the input received from the Executive Council; and the value of including historically underrepresented voices in the governance of the Church. The Standing Committee shall present a slate of nominees that includes at least six Bishops, ten presbyters or deacons, and twenty-two lay persons. Nominees for Executive Council are not required to be Deputies. There shall not be nominations for Executive Council positions from the floor of General Convention.

**(f)** The Presiding Bishop shall be the Chair of Executive Council, and the Presiding Deputy shall be the Vice Chair of Executive Council.

**(g)** The Church General Manager, the Church Treasurer, the Church Legal Officer, the General Convention Executive Officer, and the Church Secretary shall be *ex officio* members with seat and voice but no vote on the Executive Council.

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

**(i)** Should any vacancy occur in the Council through death, resignation, disability, or other reason, the Council shall fill such vacancy by the election of a suitable person to serve until a successor is elected by the General Convention. If the vacancy results in no member of Executive Council from a Province, the Council shall elect a person from that Province to fill the vacancy until the next General Convention. The General Convention shall elect a suitable person to serve the portion of any term that will remain unexpired from among nominees selected in the manner provided in this Canon.

**(j)** The Council shall exercise the powers conferred upon it by Canon, and such further powers as may be designated by the General Convention. It may, subject to the provisions of this Canon, enact procedures for its own committees.

**(k)** The Council shall elect the Church's members of the Anglican Consultative Council (ACC) and of other Anglican and ecumenical bodies for which no other procedure is provided. Members of the ACC representing The Episcopal Church shall report to each General Convention using the schedule and format required for Standing Commissions in Canon I.1.2 (j) and (k), and shall provide comprehensive written reports to Executive Council at Council's next meeting following each meeting of the ACC.

**(l)** The Presiding Deputy shall serve as a Vice President of the Domestic and Foreign Missionary Society. The Presiding Deputy shall be *ex officio* Vice Chair of Council.

**(m)** The Secretary of the General Convention shall be *ex officio* the Secretary of Council.

**(n)** Upon joint nomination of the Presiding Officers, the Council shall appoint a Church General Manager for the Domestic and Foreign Missionary Society, who shall be an adult confirmed communicant in good

standing or a member of the clergy of this Church in good standing who shall serve at the pleasure of, and report and be accountable to, the Presiding Bishop. If a vacancy should occur in the office of the Church General Manager, a successor shall be appointed in like manner.

**(o)** Upon joint nomination of the Presiding Officers, the Council shall appoint a Treasurer for the Domestic and Foreign Missionary Society, who may, but need not, be the same person as the Treasurer of the General Convention and who shall serve at the pleasure of, and report and be accountable to, the Presiding Bishop. If a vacancy should occur in that office, a successor shall be appointed in like manner. The Treasurer shall function as both treasurer and the chief financial officer of DFMS.

**(p)** Upon joint nomination of the Presiding Officers, the Council shall appoint a Church Legal Officer for the Domestic and Foreign Missionary Society, who shall serve at the pleasure of, and report and be accountable to, the Presiding Bishop. If a vacancy should occur in that office, a successor shall be appointed in like manner.

**(q)** The officers and staff of the Domestic and Foreign Missionary Society shall assist the Presiding Bishop in carrying out the work of the Church.

**(r)** Upon joint nomination of the Presiding Officers, the Council shall appoint a General Convention Executive Officer, who shall serve at the pleasure of, and report and be accountable to, the Executive Council. If a vacancy should occur in that office, a successor shall be appointed in like manner. Unless otherwise directed by Executive Council, the supporting staff of the General Convention Executive Officer shall include the functions of a Secretary and a Treasurer of the General Convention and those of a Manager of the General Convention. The General Convention Executive Officer shall be responsible for coordinating the work of the Standing Committees specifically funded by the General Convention Expense Budget.

**(s)** The Executive Council, by the affirmative vote of two-thirds of its entire membership, may elect to terminate the employment of the Church General Manager, Church Treasurer, Church Legal Officer, or General Convention Executive Officer. In that event, a successor shall be appointed in the manner set out in this Canon for appointments to those positions.

**(t)** The Chair shall preside at meetings of the Council, shall perform such other duties as are customary for such office, and shall perform such other duties as may be conferred by Canon and the bylaws of the Council. In the absence or at the request of the Chair, the Vice Chair shall preside at meetings of the Council and shall perform such other duties as may be conferred by Canon and by the bylaws of the Council.

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

the annual audit and accompanying management letter. The responsibilities of the Audit Committee shall be set out in an Audit Committee Charter. The Audit Committee shall review, at least annually, the Committee's Charter and recommend any changes to the Executive Council for approval.

**(v)** The Executive Council may establish by its bylaws such Standing Committees, consisting of its own members, as shall be appropriate and necessary for the discharge of its duties, the members of which are to be nominated jointly by the Chair and Vice Chair and appointed by the Council. The Council may also establish such other Committees and ad hoc working groups or task forces, which may include or consist of non-members, to be nominated jointly by the Chair and Vice-Chair and appointed by the Council, as may be necessary to fulfill its fiduciary responsibility to the Church. Unless otherwise provided in the procedures adopted by Executive Council, each Committee of Executive Council will cease to exist at the close of the next General Convention following its creation unless extended by Executive Council. Executive Council may revoke, rescind, or modify the mandate or charter of any Executive Council Committee not otherwise created by Canon.

**(w)** The Executive Council shall have a budget approved by General Convention for its work and the necessary expenses of its members and Committees. The Executive Council shall establish policies and procedures for managing and handling disbursements of funds from this budget.

**Sec. 4 (a)** The Council shall meet at such place, and at such stated times, at least three times each year, as it shall appoint and at such other times as it may be convened. The Council shall be convened at the request of the Chair, or on the written request of any five members thereof.

**(b)** A majority of the elected members of the Council shall be necessary to constitute a quorum at any meeting of the Council. No action shall be taken in the name of the Council except when a quorum, so defined, is present and voting. A member may participate in, and vote at, Council meeting by means of technology where all participants may hear one another simultaneously and according to procedures and guidelines set forth in the Council bylaws.

**Sec. 5.** Members of Executive Council shall be entitled to reimbursement for their reasonable expenses of attending meetings, in accordance with procedures established and approved by Executive Council. Except as determined by General Convention, the salaries of all officers of the Council and of all agents and employees of the Council and the Society shall be fixed by the Council.

**Sec. 6 (a)** The Executive Council shall submit to the General Convention at each regular session thereof a proposed budget for the Episcopal Church for the ensuing budgetary period, which budgetary period shall be equal to the interval between regular meetings of the General Convention. The Church Treasurer, supported by his or her staff, shall be responsible for preparing drafts of the proposed budget for review and approval of Executive Council.

**(b)** The budget proposed for adoption by General Convention shall provide for the expenses of the General Convention, the expenses of the mission and ministry programs of the Church and of its administration, the stipends and expenses of the Presiding Bishop and the Presiding Deputy, together with the necessary expenses of those offices, and the applicable Church Pension Fund assessments.

**(c)** Revenue to support the budget for The Episcopal Church shall be generated primarily by a single assessment of the Dioceses of the Church based on a formula which the General Convention shall adopt as part of its Program, Budget, and Finance process. If in any year the total anticipated income for budget support is less than the amount required to support the budget approved by the General Convention, the Executive Council shall make appropriate spending adjustments as faithful as possible to the budget adopted by General Convention.

(d) After the preparation of the proposed budget the Executive Council shall, at least four months before the General Convention convenes, transmit to the Bishop of each diocese and to the President of each Province a statement of the existing and the proposed assessments necessary to support the proposed budget. The Executive Council shall also submit to the General Convention, with the proposed budget, a plan for the assessments of the respective dioceses of the sum needed to fund a balanced budget.

(e) A diocese that neglects or fails to pay its assessment according to the budget adopted by General Convention shall be subject to such reduction of any Church program funds designated for the diocese as the Executive Council may approve, taking into account the diocese's particular circumstances.

(f) The General Convention shall consider and take appropriate action on the proposed budget presented to it.

(g) The Council shall have the power to approve, in accordance with such written procedures as it may deem prudent, expenditures of all sums of money covered by the budget and estimated budgets approved by the Convention, subject to such restrictions as may be imposed by the General Convention. It shall also have power to approve other initiatives proposed by the Presiding Bishop or otherwise considered by Council between meetings of the General Convention, as in the judgment of the Council are prudent and which the Church revenues will be adequate to support.

(h) Upon the adoption by the General Convention of a budget and the diocesan assessments for the budgetary period, the Council shall formally advise each diocese of its share of the total assessments to support the budget for the Episcopal Church.

(i) Each diocese shall thereupon notify each Parish and Mission of the amount of the assessments of such diocese. Each diocese shall present to each Parish and Mission a total objective which shall include both its share of the proposed Diocesan Budget and its share of the assessment of the diocese by the Executive Council in accordance with the plan adopted by the General Convention.

(j) Each diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the diocese as may be required in a form authorized by Executive Council.

(k) Each diocese shall report annually to the Executive Council the name and address of each new congregation, and of each congregation closed or removed by reason of any of the following:

- (1) dissolution of the congregation;
- (2) removal of the congregation to another diocese due to cession or retrocession of geographic territory in which the congregation is located, pursuant to Articles V.6 or VI.2 of the Constitution;
- (3) removal of the congregation to a new physical location or address, identifying both the location or address from which the congregation has removed, and the successor location or address; and
- (4) merger of the congregation into one or more other congregations, in which case the diocese shall include in its report the names of all congregations involved in the merger, and the physical location and address at which the merged congregations shall be located.

**Sec. 7 (a)** Every Missionary Bishop or, in case of a vacancy, the Bishop in charge of the jurisdiction, receiving aid from the General Convention budget, shall report at the close of each fiscal year to the Council, giving account of work performed, of money received from all sources and disbursed for all purposes, and of the state of the Church in the jurisdiction at the date of such report, all in such form as the Council may prescribe.

**(b)** Every Bishop of a diocese receiving aid from the General Convention budget shall report at the close of each fiscal year to the Council, giving account of the work in the diocese supported in whole or in part by that aid.

**Sec. 8.** The Council, as soon as practicable after the close of each fiscal year, shall cause to be prepared and publish a full report of the work of the Executive Council, the Domestic and Foreign Missionary Society, and the General Convention Office to the Church. Such report shall contain an itemized statement of all receipts and disbursements and a statement of all trust funds and other property of The Domestic and Foreign Missionary Society, and of all other trust funds and property in its possession or under its oversight responsibility. The report shall include a schedule of the salaries paid to all officers of the Domestic and Foreign Missionary Society.

EXPLANATION

These canonical changes would implement TREC's proposals to reduce the size and enhance the effectiveness of the Executive Council while retaining the Council's balance of Orders and Provincial representation and promoting a constructive framework for shared decision-making. Adoption of these changes would result in a more nimble and accountable governing structure to undergird the mission of the Church between General Conventions.

A005: OF THE PRESIDING BISHOP IN A UNICAMERAL GENERAL CONVENTION

Resolved, The House of \_\_\_\_\_ concurring, That Title I, Canon 2 be stricken in its entirety and replaced to read as follows:

**Sec. 1 (a)** At each General Convention the Clergy and Lay Orders, voting separately by order, shall each elect one person from its order from each Province as members of the Nominating Committee for the Election of the Presiding Bishop. Prior to the election, the Clerical and Lay Deputies from each Province shall hold a caucus, at which the caucus shall select two Clerical Deputies and two Lay Deputies as nominees, and these shall be the only nominees upon which the Clerical and Lay Orders shall vote in electing the members of the Nominating Committee. The election of each such member of the Committee shall be by the entire membership of the Clerical and Lay Orders, with a majority of those voting necessary for election. The Co-Chairs of General Convention, acting jointly and after consultation with representatives of youth, shall appoint two persons, age 16-21, as members of the Nominating Committee for the Election of the Presiding Bishop.

**(b)** At each General Convention, the Order of Bishops shall elect one Bishop from each Province as a member of the Nominating Committee for the Election of the Presiding Bishop. A Bishop from a particular Province may be nominated only by another Bishop from the same Province, but the election of each such member of the Committee shall be by the entire membership of the Order of Bishops, with a majority of those voting necessary for election. Prior to the election, the Bishops from each Province shall hold a caucus, at which the caucus shall select two Bishops as nominees, and these shall be the only nominees upon which the Order of Bishops shall vote in electing the members of the Nominating Committee.

**(c)** In the event vacancies shall occur in the Nominating Committee after the election of its members due to death, disability, resignation, or other cause within one year of the next General Convention, the vacancies shall not be filled, and the remaining members shall constitute the Nominating Committee. In the event such vacancies shall occur more than one year prior to the next General Convention, the Presiding Bishop shall appoint replacements for Bishops and the Chief Lay and Clergy Officer shall appoint replacements for Clerical and Lay members, in all cases from the same Provinces as those Bishops or Lay and Clergy Deputies whose positions are being filled. An elected or appointed member who shall not be a Deputy to the next General

Convention shall continue as a member of the Nominating Committee until the adjournment of such next General Convention. A member of the Committee who transfers from one Province to another or a Lay Deputy who is ordained Presbyter or Deacon, or a Presbyter or Deacon who is consecrated a Bishop, shall not thereby become ineligible to continue to serve on the Nominating Committee through the next succeeding General Convention.

**(d)** The Nominating Committee shall remain in office until the adjournment of the next General Convention, at which time a new Nominating Committee shall be elected. Members of the Committee are eligible for reelection.

**(e)** The Nominating Committee shall develop and manage a process for soliciting and identifying qualified nominees for the office of Presiding Bishop and for providing the nominees to the General Convention at which a Presiding Bishop is to be elected. The process shall include (1) providing the names of not fewer than three members of the Order of Bishops for consideration by the General Convention in the choice of a Presiding Bishop; (2) establishing a timely process for any bishop or deputy to express the intent to nominate any other member of the Order of Bishops from the floor at the time the Nominating Committee presents its nominees to the General Convention, and for each Bishop so nominated to be included in the information distributed about the nominees; (3) providing pastoral care for each nominee bishop and his or her family and diocese; and (4) determining and providing for transition assistance to the Presiding Bishop and the Presiding Bishop-elect.

**(f)** At the General Convention at which a Presiding Bishop is to be elected, the Nominating Committee shall present to the General Convention the names of not fewer than three members of the Order of Bishops for the consideration of the General Convention in the choice of a Presiding Bishop. At the session at which the Nominating Committee presents its report, any Bishop or Deputy may nominate any other member of the Order of Bishops for the consideration of the General Convention in the choice of a Presiding Bishop. Election of a Presiding Bishop shall be by concurrent vote of each Order, deliberating and voting separately, from among all such nominees. The affirmative vote of a majority of the Deputies of each Order shall be required for the election of a Presiding Bishop. There may be discussion of all nominees. If the General Convention shall find itself unable to elect a Presiding Bishop, another election process shall be held, at which additional nominations may be received, and on the following day, election shall be by the General Convention from among all of the nominees, including those previously nominated.

**(g)** In the event a vacancy in the office of Presiding Bishop shall occur in the interim between meetings of the General Convention, the Nominating Committee shall, within forty-five days of the occurrence of the vacancy, submit to the Convocation of Bishops for its consideration, the names of not fewer than three members of the Convocation of Bishops for consideration in the choice of a Presiding Bishop to fill the vacancy and simultaneously shall notify the Presiding Deputy, who shall in turn notify all Lay and Clergy Deputies. Thereafter, the Convocation of Bishops shall hold a special meeting to elect a Presiding Bishop to fill the vacancy, and in such election, the vote shall be upon the nominees of the Nominating Committee and any further nominations made by any member of the Convocation of Bishops. At the special meeting the Convocation of Bishops shall, by the affirmative vote of a majority of its members, elect a Presiding Bishop to serve until the next General Convention. Immediately following the election by the Convocation of Bishops, the Presiding Bishop-Elect shall certify to the Secretary of the General Convention, in writing, the results of the election. The Secretary of the General Convention shall then promptly inform the President and Secretary of each Diocesan Standing Committee, requesting a meeting at the earliest possible date to consider approval of the Presiding Bishop elected by the Convocation of Bishops. The Presiding Bishop-Elect of the General Convention shall also notify the Presiding Deputy, who shall notify all Lay and Clergy Delegates of the results of the election. Upon receipt of the approval of a majority of the Standing Committees of the Dioceses, the Presiding Bishop Elect shall be declared elected.

**Sec. 2.** The term of office of the Presiding Bishop, when elected according to the provisions of Article I, Section 3 of the Constitution, shall be nine years, beginning the first day of the month of November following the close of the Convention at which the Presiding Bishop is elected, unless attaining the age of seventy-two years before the term shall have been completed; in that case, the Presiding Bishop shall resign the office to the General Convention that occurs nearest to the date of attaining such age. At that Convention a successor shall be elected and shall assume office on the first day of the month of November following the close of that Convention or immediately upon the death, retirement, or disability of the Presiding Bishop. When a Presiding Bishop has been elected by the Convocation of Bishops to fill a vacancy, as provided for in the second paragraph of Article I, Section 3 of the Constitution, the Presiding Bishop so elected shall take office immediately.

**Sec. 3 (a)** Upon the expiration of the term of office of the Presiding Bishop, the Bishop who is elected successor shall tender to the General Convention a resignation from the Bishop's previous jurisdiction to take effect upon the date of assuming the office of Presiding Bishop, or, upon good cause with the advice and consent of the Advisory Committee established under the Rules of Order of the Convocation of Bishops, not later than six months thereafter.

**(b)** Such resignation shall be acted upon immediately by the Order of Bishops.

**Sec. 4 (a)** The Presiding Bishop shall be the Chief Pastor and Primate of the Church. The Presiding Bishop shall also:

**(1) (a)** Be charged with responsibility for leadership in initiating and developing the policy and strategy in the Church and speaking for the Church as to the policies, strategies, and programs authorized by the General Convention. The Presiding Bishop shall have primary responsibility for the execution of the program and policies adopted by the General Convention and the coordination, development, and implementation of the ministry and mission of the Church.

**(b)** The Presiding Bishop may, if he or she deems it appropriate to carry out the ministry and mission of the Church between sessions of General Convention, carry out new initiatives, with the approval of the Executive Committee.

**(c)** The Presiding Bishop and the Church General Manager, assisted by their respective staffs, shall be responsible for generating drafts of reports to General Convention for review and approval by the Executive Council and for providing information requested by Executive Council in order to discharge its responsibilities.

**(d)** The Presiding Bishop shall serve as the President of the Domestic and Foreign Missionary Society.

**(e)** In consultation with the Executive Council, the Presiding Bishop and the Presiding Deputy may appoint ad hoc task forces that include or consist solely of persons outside the staff of DFMS, if they deem that advisable in order to best implement the Resolutions or the work of the Church. The members of the Task Forces shall be proposed by the Presiding Bishop and the Presiding Deputy and be approved by Executive Council. The term of the appointments to the Task Forces shall be no longer than three years, unless members of the Task Forces are reappointed at the end of their term.

**(2)** Speak God's words to the Church and to the world, as the representative of this Church and its episcopate in its corporate capacity;

**(3)** In the event of an Episcopal vacancy within a diocese, consult with the Ecclesiastical Authority to ensure that adequate interim Episcopal Services are provided;

(4) Take order for the consecration of Bishops, when duly elected; and, from time to time, assemble the Bishops of this Church to meet, either as the Convocation of Bishops or otherwise, and set the time and place of such meetings;

(5) Preside over meetings of the Order or Convocation of Bishops; have the right of calling for a meeting of General Convention, of recommending legislation to the General Convention; and whenever addressing the General Convention upon the state of the Church, it shall be incumbent upon the General Convention to consider any recommendations contained in such address;

(6) Visit every diocese of this Church for the purpose of:

(i) Holding pastoral consultations with the Bishop or Bishops thereof and, with their advice, with the Lay and Clerical leaders of the jurisdiction;

(ii) Preaching the Word; and

(iii) Celebrating the Holy Eucharist.

(b) The Presiding Bishop shall report annually to the Church, and may, from time to time, issue Pastoral Letters.

(c) The Presiding Bishop shall perform such other functions as shall be prescribed in these Canons.

**Sec. 5.** The stipends of the Presiding Bishop and such personal assistants as may be necessary during the Presiding Bishop's term of office for the effective performance of the duties, and the necessary expenses of that office, shall be fixed by the General Convention and shall be provided for in the budget to be submitted by the Treasurer, as provided in the Canon entitled, "Of the General Convention."

**Sec. 6.** In the event of the disability of the Presiding Bishop, the Bishop who, according to the Rules of the Order of Bishops, becomes its Presiding Officer, shall be substituted for the Presiding Bishop for all the purposes of these Canons, except the Canons entitled, "Of the Domestic and Foreign Missionary Society," and "Of the Executive Council."

**Sec. 7.** Upon the acceptance of the Presiding Bishop's resignation for reasons of disability prior to the expiration of the term of office, the Presiding Bishop may be granted, in addition to whatever allowance may be received from The Church Pension Fund, a disability allowance to be paid by the Treasurer of the General Convention in an amount to be fixed by the Standing Committee on Program, Budget, and Finance; and ratified at the next regular meeting of the General Convention.

#### EXPLANATION

This resolution establishes a procedure for nominating and electing a Presiding Bishop in a unicameral General Convention.

#### A006: RESTRUCTURE STANDING COMMISSIONS AND INTERIM BODIES OF GENERAL CONVENTION

Resolved, the House of \_\_\_\_\_ concurring, That Title I, Canon 1, section 2 be stricken in its entirety and replaced to read as follows:

**Sec. 2 (a)** The General Convention by Canon may establish Standing Commissions to study and draft policy proposals on major subjects considered to be of continuing concern to the mission of the Church. The Canon shall specify the duties of each Standing Commission. Standing Commissions shall be composed of three (3) Bishops, three (3) Priests and/or Deacons of this Church and six (6) Lay Persons, who shall be confirmed adult communicants of this Church in good standing. The Priests, Deacons, and Lay Persons are not required to be Deputies to General Convention.



**(b)** The terms of all members of Standing Commissions shall be equal to the interval between the regular meeting of the General Convention preceding their appointment and the adjournment of the second succeeding regular meeting of the General Convention, and such terms shall be rotated so that, as near as may be, the term of one half of the members shall expire at the conclusion of each regular meeting of the General Convention. The term of a member shall become vacant in the event of two absences from meetings of the Commission occurring in the interval between successive regular meetings of the General Convention unless excused by the Commission for good cause.

**(c)** The Presiding Bishop shall appoint the Episcopal members and the Presiding Deputy the Lay and other Clerical members, of each Commission as soon as practicable after the adjournment of the General Convention, but not later than ninety (90) days after adjournment. Episcopal members appointed after the adjournment of any General Convention at which a Presiding Bishop is elected shall be appointed by the Presiding Bishop-elect. Vacancies shall be filled in similar manner; *provided, however*, that vacancies occurring within one year of the next regular General Convention shall not be filled unless requested by the Commission.

**(d)** The Presiding Bishop and the Presiding Deputy may jointly appoint members of the Executive Council as liaisons to facilitate communication between the Executive Council and each Commission and the coordination of the work of each Commission and the committees of Executive Council. Notice of such appointments shall be given to the Secretary of General Convention. These liaisons shall not be members of the Commission but shall have seat and voice. The reasonable expenses of these liaisons shall be provided for by the Executive Council. Each Commission shall have staff support from the Domestic and Foreign Missionary Society designated by the Executive Officer of General Convention. Each Commission may constitute committees from among members or non-members of the Commission, and, subject to the Commission's budget, engage the services of consultants and coordinators necessary to complete its work.

**(e)** The Presiding Bishop and the Presiding Deputy shall be members *ex officio* of every Commission, or may appoint personal representatives to attend any meeting in their stead, but without vote.

**(f)** The Executive Officer of the General Convention shall, not later than one hundred and twenty (120) days following the meeting of the General Convention, notify the members of the General Convention of the Commission appointments and their duty to present reports to the next Convention and shall schedule an organizational meeting for each Commission. One year prior to the opening day of the Convention, the Executive Officer of the General Convention shall remind the Chairs and Secretaries of all Commissions of this duty.

**(g)** Every Commission shall elect a chair, vice chair, and secretary.

**(h)** The General Convention may refer a relevant matter to a Commission for its consideration; but may not direct the Commission to reach any particular conclusion.

**(i)** A Commission shall give timely and appropriate notice to the Church of the time, place, and agendas of meetings; and instructions on how members of the Church may address their views to the Commission.

**(j)** Every Commission shall prepare a report, which, together with any minority report, shall be sent, not later than 150 days prior to the opening day of each Convention, to the Executive Officer of the General Convention, who shall distribute the same to all members of the Convention.

**(k)** The Report of every Commission presented at the General Convention shall:

**(1)** Set forth the names of its original members, any changes in membership, the names of all those who concur in, and all those who dissent from, its recommendations.

(2) Summarize the work of the Commission, including the various matters studied, the recommendations for action by the General Convention, and drafts of Resolutions proposed for adoption to implement the recommendations of the Commission.

(3) Include a detailed report of all receipts and expenditures, including moneys received from any source whatsoever, and if it recommends that it be continued, the estimated requirements for the ensuing interval until the next regular meeting of the General Convention.

(l) Every Commission, as a condition precedent to the presentation and reception of any report to General Convention, in which such Commission proposes the adoption of any Resolution, shall, by vote, authorize a member or members of General Convention, who, if possible, shall be a member of the Commission, with such limitations as the Commission may impose, to accept or reject, on behalf of the Commission, any amendments proposed by General Convention to any such Resolution; provided, however, that no such amendment may change the substance of the proposal, but shall be primarily for the purpose of correcting errors. The name of the member or members of General Convention upon whom such authority has been conferred, and the limitations of authority, shall be communicated in writing to the Presiding Officers of General Convention not later than the presentation of such report to the General Convention.

(m) There shall be the following Standing Commissions:

(1) A Standing Commission on Governance, Constitution and Canons. It shall be the duty of the Commission to:

(i) Review such proposed amendments to the Constitution and Canons as may be submitted to the Commission, placing each such proposed amendment in proper Constitutional or Canonical form, including all amendments necessary to effect the proposed change. The Commission shall express its views with respect to the substance of any such proposal only to the proponent thereof; *Provided, however*, that no member of the Commission shall, by reason of membership, be deemed to be disabled from expressing, before a Legislative Committee or on the floor of the General Convention, personal views with respect to the substance of any such proposed amendment.

(ii) Conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity, and on the basis of such a review, propose to the General Convention such technical amendments to the Constitution and Canons as in the opinion of the Commission are necessary or desirable in order to achieve such consistency and clarity without altering the substance of any Constitutional and Canonical provisions; *Provided, however*, that the Commission shall propose, for the consideration of the appropriate Legislative Committees of the General Convention, such amendments to the Constitution and Canons as in the opinion of the Commission are technically desirable but involve a substantive alteration of a Constitutional or Canonical provision.

(iii) On the basis of such review suggest to the Domestic and Foreign Missionary Society such amendments to its by-laws as in the opinion of the Commission are necessary or desirable in order to conform the same to the Constitution and Canons.

(iv) Conduct a continuing and comprehensive review and update of the authorized “Annotated Constitution and Canons for the Government of the Protestant Episcopal Church in the United States of America otherwise known as The Episcopal Church” to reflect actions of General Convention which amend the Constitution and Canons and, in the discretion of the Commission, develop other materials which are appropriate to the purpose of the “Annotated Constitution and Canons,” and facilitate the publication of this document and related materials. The Commission may provide or support forums to promote commentary, discussion, and understanding of the Constitution and Canons.

(v) Discharge such other duties as shall from time to time be assigned by the General Convention.

(2) A Standing Commission on Theology, Liturgy and Music. The Custodian of the Book of Common Prayer shall be a member *ex officio* with voice, but without vote. It shall be the duty of the Commission to:

- (i) Discharge such duties as shall be assigned to it by the General Convention as to policies and strategies concerning the common worship of this Church.
  - (ii) Collect, collate, and catalogue material bearing upon possible future revisions of the Book of Common Prayer.
  - (iii) Cause to be prepared and to present to the General Convention recommendations concerning the Lectionary, Psalter, and offices for special occasions as authorized or directed by the General Convention or Convocation of Bishops.
  - (iv) Recommend to the General Convention authorized translations of the Holy Scripture from which the Lessons prescribed in the Book of Common Prayer are to be read.
  - (v) Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.
  - (vi) Collect, collate, and catalogue material bearing upon possible future revisions of The Hymnal 1982 and other musical publications regularly in use in this Church, and encourage the composition of new musical materials.
  - (vii) Cause to be prepared and present to the General Convention recommendations concerning the musical settings of liturgical texts and rubrics, and norms as to liturgical music and the manner of its rendition.
  - (viii) At the direction of the General Convention, to serve the Church in matters pertaining to policies and strategies concerning Church music.
- (n) Within 90 days of the adjournment of a General Convention and subject to budgeted funds available for the purpose, the Presiding Bishop and the Presiding Deputy shall review the resolutions adopted by the General Convention that provide for any study or further action, and shall thereupon, in consultation with Executive Council, jointly appoint such study committees and task forces as are necessary to complete that work. The composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless re-appointed by the Presiding Bishop and Presiding Deputy.

EXPLANATION

This proposal eliminates several Standing Commissions, and instead retains only a Standing Commission on Theology, Liturgy, and Music; and a Standing Commission on Governance and Structure. It charges the presiding officers of a unicameral convention, in consultation with Executive Council, to appoint any other interim committees and task forces that may be necessary to carry out the work of the General Convention or address other important church-wide priorities. This proposal will help the church-wide structures to develop a sharper focus on top priorities as identified by General Convention, reduce redundancy in the church-wide structures, align human and financial resources most closely with stated priorities, and build in a higher degree of accountability for the work of interim bodies.

A007: CANONICAL IMPLEMENTATION OF A UNICAMERAL GENERAL CONVENTION

Resolved, The House of \_\_\_\_\_ concurring, That Title I, Canon I, Section 1 be stricken in its entirety and replaced to read as follows:

**Sec. 1 (a)** At the time and place appointed for the meeting of the General Convention, the Presiding Bishop or the Presiding Deputy, or, if there be neither, a presiding officer *pro tempore* appointed by the Order of Bishops, shall call to order the members present. The Secretary, or, if absent, a Secretary *pro tempore* appointed by the presiding officer, shall record the names of those whose testimonials, in due form, shall have been presented, which record shall be prima facie evidence that the persons whose names are therein recorded are entitled to seats. In the event that testimonials are presented by or on behalf of persons from jurisdictions that have not previously been represented in a General Convention, then the Secretary, or one

appointed instead as provided herein, shall proceed as provided in Clause (c). If there be a quorum present, the Secretary shall so certify, and the presiding officer shall declare the General Convention organized. Any vacancy in the office of presiding officer shall then be filled by election, by ballot, to a term expiring upon the adjournment of the General Convention.

**(b)** The Presiding Bishop shall be elected by the General Convention and shall serve as a Co-Chair of General Convention. The term of the Presiding Bishop shall be as set forth in the applicable Canon. The Presiding Bishop shall be elected by the General Convention in the manner herein set forth not later than the fourth day of the regular meeting of the General Convention following which his or her term expires. The Presiding Bishop shall take office at the adjournment of the regular meeting at which he or she is elected.

**(c)** The General Convention shall also elect a Presiding Deputy and an Assistant Presiding Deputy from the Lay or Clergy order who shall perform the duties normally appropriate to their respective offices as specified in these Canons. They shall be elected not later than the fourth day of each regular meeting of the General Convention in the manner herein set forth. The Lay and Clergy Deputies shall elect from their membership, by joint vote, by a majority of separate ballots, a Presiding Deputy and an Assistant Presiding Deputy, who shall be of different orders. Such officers shall take office at the adjournment of the regular meeting at which they are elected, and shall continue in office until the adjournment of the following regular meeting of the General Convention. They shall be and remain ex officio members of General Convention during their term of office. The Presiding Deputy and the Assistant Presiding Deputy shall each serve a term of one three year period. No person elected Presiding Deputy or Assistant Presiding Deputy may serve more than three consecutive full terms in each respective office. In case of the resignation, death, absence, or inability to serve of a Presiding Deputy, the Assistant Presiding Deputy shall perform the duties of the office until the adjournment of the next meeting of the General Convention. In case of resignation, death, absence, or inability of the Assistant Presiding Deputy, the Presiding Deputy shall appoint a Deputy of the opposite order, upon the advice and consent of the lay persons, presbyters, and deacons of the Executive Council, who shall serve until the adjournment of the next meeting of the General Convention.

**(d)** The Presiding Bishop and the Presiding Deputy shall alternate presiding at sessions (i.e., morning, afternoon, evening) of the General Convention. The Presiding Bishop shall preside at the first session of each General Convention. The Presiding Bishop and the Presiding Deputy shall perform the duties normally appropriate to their respective offices or specified in these Canons. The Presiding Bishop and the Presiding Deputy are sometimes referred to as the Presiding Officers.

**(e)** Each of the Presiding Officers shall be authorized to appoint a Council of Advice for consultation and advice in the performance of the duties of his or her offices. Each of the Presiding Officers may also appoint a Chancellor, a confirmed adult communicant of the Church in good standing who is learned in both ecclesiastical and secular law, to serve so long as each Presiding Officer may desire, as counselor in matters relating to the discharge of the responsibilities of his or her office.

**(f)** To aid the Secretary in preparing the record specified in Clause (a), the Secretary of the Convention of every diocese shall forward to the Secretary of the General Convention, as soon as may be practicable, a copy of the latest Journal of the Diocesan Convention, together with a certified copy of the testimonials of the election of diocese's Deputies and Alternate Deputies. Where testimonials are received for persons from jurisdictions that have not previously been represented in General Convention, the Secretary shall ascertain that the applicable provisions of Article V, Section 1, of the Constitution have been complied with prior to such persons being permitted to take their seats in the General Convention.

**(g)** The Secretary shall keep full minutes of the proceedings of the General Convention; record them, with all reports, in a book provided for that purpose; preserve the Journals and Records of the General Convention; file them in the Archives; and perform such other duties as may be directed by the General Convention.

The Secretary may, with the approval of the General Convention, appoint Assistant Secretaries, and the Secretary and Assistant Secretaries shall continue in office until the organization of the next regular meeting of the General Convention, and until their successors be chosen.

(h) It shall be the duty of the Secretary of the General Convention, whenever any alteration of the Book of Common Prayer or of the Constitution is proposed, or any other subject is submitted to the consideration of the several Diocesan Conventions, to give notice thereof to the Ecclesiastical Authority of the Church and the Secretary of the Convention of every diocese. The Secretary shall notify all diocesan Secretaries that it is their duty to make known such proposed alterations of the Book of Common Prayer, and of the Constitution, and such other subjects, to the Conventions of their respective dioceses at their next meeting, and to certify to the Secretary of the General Convention that such action has been taken.

(i) The Secretary and the Treasurer of the General Convention shall be entitled to seats upon the floor of the General Convention, and, with the consent of the presiding officer, they may speak on the subjects of their respective offices.

(j) If, during recess, a vacancy shall occur in the office of Secretary of the General Convention, the duties thereof shall devolve upon the First Assistant Secretary, or, if there be none, upon a Secretary *pro tempore* appointed by the presiding officers, acting jointly.

(k) At every regular meeting of the General Convention, the Secretary shall have responsibility for assembling and printing of the Journal of the General Convention, and for other matters specifically referred to the Secretary.

(l) Each General Convention shall function for the Church both as a legislative body and as a mission-oriented convocation.

EXPLANATION

This revision outlines the electing and presiding procedures for the Co-Chairs and other officers of General Convention in a unicameral model. It also calls for General Convention to serve as both a legislative body and a mission-oriented convocation.

A008: PROVIDE STIPEND FOR THE PRESIDENT OF THE HOUSE OF DEPUTIES/PRESIDING DEPUTY

Resolved, The House of \_\_\_\_\_ concurring, That Canon 1.1.8 is hereby amended to read as follows:

**Sec. 8.** The General Convention shall adopt, at each regular meeting, a budget to provide for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, *and the stipend of the Presiding Deputy (which official title shall remain "President of the House of Deputies" so long as under the Constitution there remains a separate House of Deputies)* (~~the necessary expenses of the President of the House of Deputies~~), including the staff and Advisory Council required to assist in the performance of the duties and matters related to the ~~President's office~~ *offices of the Presiding Bishop and Presiding Deputy*, and the applicable Church Pension Fund assessments. To defray the expense of this budget, an assessment shall be levied upon the dioceses of the Church in accordance with a formula which the Convention shall adopt as part of this Expense Budget. It shall be the duty of each Diocesan Convention to forward to the Treasurer of the General Convention annually, on the first Monday of January, the amount of the assessment levied upon that diocese.

EXPLANATION

The position of Presiding Deputy plays an important role in representing the orders of clergy and laity throughout the Episcopal Church, as well as to our Anglican Communion partners and in our ecumenical relationships. The office is also an important symbol of our value of shared governance among all orders of ministry. Due to the many demands associated with carrying out the duties of this position, the current lack of a stipend limits the pool of potential candidates to those whose lifestyles or professional positions allow them to devote significant volunteer time to the position. Establishing a stipend will expand the number of potential candidates for this important position in our polity and governance.

A009: OF CHANGES TO THE OFFICERS OF THE DOMESTIC AND FOREIGN MISSIONARY SOCIETY

Resolved, The House of \_\_\_\_\_ concurring, That Canon 1.4 be amended to read as follows:

**CANON 3: Of the Domestic and Foreign Missionary Society**

The Constitution of the said Society, which was incorporated by an act of the Legislature of the State of New York, ~~as and~~ from time to time amended, *is hereby amended* and established so as to read as follows: Constitution of The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America as established in 1821, and since amended at various times.

**ARTICLE I** This organization shall be called the Domestic and Foreign Missionary Society (*DFMS*). ~~of the Protestant Episcopal Church in the United States of America, and shall be considered as comprehending all persons who are members of the Church~~

**ARTICLE II** The Executive Council, as constituted by Canon, shall be its Board of Directors, and shall adopt bylaws for its government not inconsistent with the Constitution and Canons.

**ARTICLE III** The officers of the DFMS shall be a President, Vice Presidents, a Secretary, a Treasurer, and such other officers as may be appointed in accordance with the Canons or bylaws. The Presiding Bishop of the Church shall be the President of the ~~DFMS Society~~; one Vice President shall be the person who is the ~~Presiding Deputy President of the House of Deputies~~; and one Vice President shall be the person who is the ~~Church General Manager Chief Operating Officer~~; the Treasurer shall ~~also serve as be the person who is the~~ Chief Financial Officer of the DFMS. ~~Executive Council; and the Secretary shall be the person who is the Secretary of the Executive Council, and shall have such powers and perform such duties as may be assigned by the By laws. The other officers of the Society shall be such as are provided for by the By laws of the Society.~~ The tenure of office, compensation, powers, and duties of the officers of the ~~DFMS Society~~ shall be such as are prescribed by the Canons and by the bylaws of the ~~DFMS Society~~ not inconsistent *with the Canons. therewith.*

**ARTICLE IV** This Constitution of the Society may be altered or amended at any time by the General Convention of the Church.

EXPLANATION

This Resolution conforms the Constitution of the Domestic and Foreign Missionary Society to the changes proposed in other Resolutions to the makeup of the DFMS officers.

## ABBREVIATIONS & ACRONYMS USED IN THE BLUE BOOK

- AANGLIDESH** — Agencia Anglicana para el Desarrollo de Honduras  
(Episcopal Diocese of Honduras and its Anglican Agency of Development)
- ABCD** — Asset-Based Community Development
- ACC** — Anglican Consultative Council
- ADDRO** — Anglican Diocesan Development and Relief Organization
- A&N** — Executive Council Joint Standing Committee for Advocacy and Networking
- Archives** — Board of Archives of the Episcopal Church
- ARCT** — Anti-Racism Certification Training
- ASA** — Average Sunday Attendance
- BCP** — Book of Common Prayer
- BOS** — Book of Occasional Services
- CCABs** — Commissions, Committees, Agencies, and Boards
- CCT** — Christian Churches Together
- CDFI** — Community Development Financial Institutions
- CDI** — Church Development Institute
- CPF** — Board of Trustees of the Church Pension Fund
- CPG** — Church Pension Group
- CPI** — Church Publishing Incorporated
- CSTF** — Congregational Song Task Force
- CWS** — Church World Service
- DBB** — Disciplinary Board for Bishops
- DFMS** — The Domestic and Foreign Missionary Society
- DHP** — Denominational Health Plan
- ECBF** — Episcopal Church Building Fund
- ECC** — Episcopal Church Center
- ECCAR** — Executive Council Committee on Anti-Racism
- ECCEBT** — Episcopal Church Clergy and Employees' Benefit Trust
- ECCSTF** — Executive Council Committee on Science, Technology and Faith
- ECL** — Episcopal Church of Liberia
- ECP** — Episcopal Church in the Philippines
- ECW** — Episcopal Church Women
- EDEIO** — Episcopal Diocesan Ecumenical and Religious Officers
- EFM** — Education for Ministry
- EJLC** — Economic Justice Loan Committee
- ELCA** — Evangelical Lutheran Church of America
- ELLC** — English Language Liturgical Consultation
- ENSTF** — Episcopal Network for Science, Technology & Faith
- ENS** — Episcopal News Service
- EOW** — Enriching Our Worship
- EPPN** — Episcopal Public Policy Network
- ERACE** — Eliminating Racism and Claiming/Celebrating Equality
- ERD** — Episcopal Relief and Development Board
- ERIC** — Employee Resource and Information Center
- ERT** — Ecumenical Roundtable on Science, Technology, and the Church
- EVIM** — Episcopal Volunteers in Mission
- FM, FFM** — Executive Council Joint Standing Committee on Finances for Mission
- GAM** — Executive Council Joint Standing Committee on Governance and Administration for Mission

**GC** — General Convention  
**GCW** — A Great Cloud of Witnesses  
**GBEC** — General Board of Examining Chaplains  
**GTU** — Graduate Theological Union  
**HB, HOB** — House of Bishops  
**HD, HOD** — House of Deputies  
**IALC** — International Anglican Liturgical Consultation  
**IARCA** — Anglican Church of the Central Region of America  
**IC, ECIC** — Executive Council Investment Committee  
**IFI** — Iglesia Filipina Independiente  
**IM, ECCIM** — Executive Council Committee on Indigenous Ministries  
**JNCPB** — Joint Nominating Committee for the Election of a Presiding Bishop  
**JSCN** — Joint Standing Committee on Nominations  
**LECUSA** — Liberian Episcopal Community in the USA  
**LPM** — Leadership Program for Musicians Serving Small Congregations  
**LPS** — Lay Employee Pension System  
**LECC** — Lutheran Episcopal Coordinating Committee  
**MDGs** — Millennium Development Goals  
**NEAC** — National Episcopal AIDS Coalition  
**NAES** — National Association of Episcopal Schools  
**NCC** — National Council of Churches  
**OGR** — Office of Government Relations, The Episcopal Church  
**PB** — Presiding Bishop  
**PB&F** — Joint Standing Committee on Program, Budget & Finance  
**PD** — Presiding Deputy  
**PLC** — Provincial Leadership Conference  
**RCL** — Revised Common Lectionary  
**SCCIT** — Standing Commission on Communication and Information Technology  
**SCLCFE** — Standing Commission on Lifelong Christian Formation and Education  
**SCLM** — Standing Commission on Liturgy and Music  
**SCMD** — Standing Commission on Ministry Development  
**SCME** — Standing Commission on the Mission and Evangelism of the Episcopal Church  
**SCSJPP** — Standing Commission on Social Justice and Public Policy  
**SCWM** — Standing Commission on World Mission  
**SFG** — Seeing the Face of God in Each Other  
**TEC** — The Episcopal Church  
**TEAC** — Theological Education for the Anglican Communion  
**TENS** — The Episcopal Network for Stewardship  
**TREC** — Task Force for Reimagining the Episcopal Church  
**UTO** — United Thank Offering  
**WCTU** — Women’s Christian Temperance Union  
**WCC** — World Council of Churches  
**YASC** — Young Adult Service Corps



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