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HOUSE OF BISHOPS COMMITEE ON PASTORAL DEVELOPMENT

Membership

The Rt. Rev. Gayle E. Harris, *Chair*	Massachusetts, I	2018
The Rt. Rev. Jennifer L. Baskerville-Burrows	Indianapolis, V	2018
The Rt. Rev. Oge Beauvoir	Haiti, II	2018
The Rt. Rev. Susan Goff	Virginia, III	2018
The Rt. Rev. Herman Hollerith	Southern Virginia, III	2018
The Rt. Rev. Whayne Hougland	Western Michigan, V	2018
The Rt. Rev. Robert J. O'Neill	Colorado, VI	2018
The Rt. Rev. Todd Ousley	Eastern Michigan, V	2018
The Rt. Rev. Jake W. Owensby	Western Louisiana, VII	2018
The Rt. Rev. Lawrence Provenzano	Long Island, II	2018
The Rt. Rev. James E. Waggoner, Jr.	Spokane, VIII	2018
The Rt. Rev. Dean E. Wolfe	New York, II	2018
The Rev. Betsy Fisher, *SPG Representative*	Western Massachusetts, I	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	

Representation at General Convention

Bishop Gayle Harris is authorized to receive non-substantive amendments to this report at General Convention.

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 by building systems that provide pastoral care and foster healthy relationships; by providing opportunities for education and training that form gracious leadership practices focused on serving and empowering 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.

Summary of Work

MEETINGS

The Committee usually meets twice per year, once in person and once via teleconference during the triennium. Additionally, it meets at regularly scheduled meetings of the House of Bishops. A minor shift in meeting patterns occurred during 2016-2017 to enable transitions in the Office of Pastoral Development.

The Committee focused on the following matters during the triennium:

1. Promoting and incorporating core values at each meeting in order to continue to develop a learning, discerning, and healing community within the House of Bishops;

2. Continuing to serve as a council of advice and support to the Bishop for the Office of Pastoral Development;

3. Working with the House of Bishops Planning Committee on the continuity of programs between House of Bishops meetings;

4. Supporting collaboration and collegiality between the Network of Spouses and Partners of Bishops and the House of Bishops;

5. Providing direct pastoral care to bishops and their families;

6. Providing research and offering reports to House of Bishops regarding appropriate use of Social Media within the House;

7. Continuing discussion of concerns about and possible revisions of Title IV;

8. Continuing conversations regarding the ministries, care and support of Bishops Suffragan;

9. Assisting 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. Continuing to advise the Bishop for Pastoral Development in the creation of gracious norms for the spouses of newly elected bishops when that bishop's spouse is ordained and is currently serving, or wishes to serve, within that diocese;

RECOMMENDATIONS FROM THE COMMISSION ON IMPAIRMENT AND LEADERSHIP

The Bishop for Pastoral Development, Chancellor to the Presiding Bishop, and Special Counsel to the Presiding Bishop met in June 2017 for a debrief with the Chair and members of the Commission on Impairment and Leadership to identify areas of the Report directly impacting the work of the Office of Pastoral Development. The following are recommendations noted for action by the Office of Pastoral Development and actions taken thus far:

1. **Recommendation:** " . . . [the] House of Bishops incorporate into its meetings an ongoing and continuing process of education [on addiction and substance abuse] . . . namely, . . . an examination of a new bishop's relationship to alcohol and addiction; . . . training in all required policies and practices of the Church and all canonical provisions that apply to clergy with regard to alcohol, substance, or process addictions; . . . training in best practices for early detection intervention, treatment, monitoring and ongoing support for clergy struggling with addiction; . . . [and] training in best practices for vetting and evaluating those in various stages of discernment --- either before ordination or at any time of deployment --- with regard to addiction and recovery. "

   Action Taken: Referral to House of Bishops Planning Committee for coordination with College for Bishops

2. **Recommendation:** ". . . the bishop with oversight over the Office of Pastoral Development, drawing on the research from this commission, establish a standardized process for conducting episcopal elections."

   Action Taken: Continued evaluation alongside episcopal consultants and dioceses of already-established best practices for episcopal elections with incorporation of new recommendations to dioceses undergoing episcopal elections since July 1, 2017. New recommendations include:

   a) Canonically-mandated medical and psychiatric examinations for bishops-elect be voluntarily undertaken with all those persons identified to be named as nominees for bishop. This enhanced process allows for greater likelihood of identifying impairment(s) prior to election rather than after.

   b) With assistance from a newly-hired Consulting Psychiatrist to the Presiding Bishop, revision and enhancement of medical and psychiatric screening processes to include more extensive medical lab tests and a cascading process of psychiatric evaluations, with particular focus on impairment issues.

   c) Consultation with Episcopal Recovery Ministries of the Episcopal Church on provision to all parties in an episcopal election process of checklists and competent counsel for recognizing and addressing any issues with addiction or impairment that may emerge during the course of their work.

3. **Recommendation:** " . . . the Pastoral Development Committee of the House of Bishops, working with a knowledgeable and skilled advisor, evaluate the policies and practices of meetings of the House of Bishops and recommend changes that may contribute to a healthy environment with regard to alcohol and addiction."

   Action Taken: Referral to House of Bishops Planning Committee for joint-process of evaluation and change recommendations.

4. **Recommendation**: " . . . the Presiding Bishop . . . establish a team of advisors or consultants to serve as a resource on alcoholism and other forms of addiction in order to provide a rapid response to issues of questionable impairment, to provide clergy or other concerned individuals with confidential advice, and to assist with monitoring, recovery and re-entry into ministry. "

    Action Taken: Bishop of Pastoral Development has consulted with the Episcopal Recovery Ministries of the Episcopal Church for recommendations on establishment of advisory team.

ADDITIONAL INITIATIVES/PLANS OF THE OFFICE OF PASTORAL DEVELOPMENT AND THE COMMITTEE ON PASTORAL DEVELOPMENT OF THE HOUSE OF BISHOPS

1. **Diversity in the House of Bishops:** plans are underway to engage the Presiding Bishop and the President of the House of Deputies in the creation of a Diversity Task Force to assist the Office of Pastoral Development in identifying additional best practices for enhancing the diversity of the House of Bishops with particular reference to the election of women, persons of color, and LGBTQ persons.

    Budget Request: $20,000 for two (2) face-to-face meetings of the Task Force and any associated consultant costs.

2. **Discernment materials:** Upon recommendation of the Bishop for Pastoral Development, joint-appointment of a Task Force on Discernment and Process, by the Presiding Bishop and President of the House of Deputies. The Task Force will be intended to assist in the continued development of:

    a) Discernment materials/processes for those considering the episcopate;

    b) Discernment and pastoral care materials/processes for spouses/families;

    c) Creation of a web-based guide to best practices in episcopal election processes that will allow more ready-access to recommended practices and greater transparency to the whole Church.

    Budget Request: $50,000 for two (2) meetings of the Task Force and costs associated with materials and process development plus creation of web-based best practices "manual."

Proposed Resolution

Proposed Canonical Revision

RESOLUTION A084: REPLACEMENT OF TITLE III.12.9 (P) & (Q) INCAPACITY OF THE DIOCESAN & INCAPACITY OF THE BISHOP COADJUTOR

Resolved, the House of _____ concurring, That Canon III.12 be amended as follows:

Sec. 9 The Resignation or Incapacity of Bishops

~~(p) When it is certified to the Presiding Bishop, by at least two licensed medical doctors, psychologists or psychiatrists, who have examined the case, that a Bishop Diocesan is incapable of authorizing the Bishop Coadjutor, if there is one, or a Bishop Suffragan, if there is one, or the Standing Committee to act as the Ecclesiastical Authority, then, upon the advice of five Bishops of neighboring Dioceses selected by the Presiding Bishop, the Presiding Bishop shall declare the Bishop Coadjutor, or a Bishop Suffragan, if the Constitution and Canons of the Diocese so provide, or the Standing Committee to be the Ecclesiastical Authority for all purposes set forth in these Canons and to retain such canonical authority until the Presiding Bishop, acting upon a like certificate, declares the Bishop Diocesan competent to resume official duties.~~

~~(q)If it is certified to the Ecclesiastical Authority of a Diocese by two licensed medical doctors, psychologists or psychiatrists, selected by the Ecclesiastical Authority, that the Bishop Coadjutor in the Diocese is permanently unable, by reason of medical, psychological or psychiatric condition, to carry out the duties of Bishop Coadjutor, the Ecclesiastical Authority, upon the advice of three Bishops of three neighboring Dioceses, may declare that the right of succession of the Bishop Coadjutor is terminated and a new Bishop Coadjutor may then be elected as provided in Canon III.11.9.~~

Sec. 10 Impairment

When any of (i) a Bishop of a Diocese, including a Bishop Diocesan, a Bishop Coadjutor or a Bishop Suffragan of that Diocese, (ii) a two-thirds majority of all of the members of the Standing Committee of a Diocese, (iii) a two-thirds majority of a Diocese's Convention, or (iv) at least five Bishops conclude that a Bishop of the aforementioned Diocese is seriously impaired, either physically, psychologically, or emotionally, and that the impairment is causing substantial harm, or presents a significant risk of causing substantial harm, to the Bishop in question, his or her family, the Diocese, the Church, or any other person or community, the person or body reaching that conclusion may petition the Presiding Bishop, in writing, to intervene and assist in the matter. The written petition shall include sufficient information to inform the Presiding Bishop and the parties involved of the specifics of the purported impairment. The Presiding Bishop shall initiate such efforts as are appropriate under the circumstances to attempt to ascertain the nature and severity of any impairment and to address any such impairment, which efforts may include, but are not limited to, the appointment of medical and other professionals, consultants or mediators, as well as the issuance of Pastoral Directions.

And be it further

Resolved, That Sections III.12.10, 11 and 12 be renumbered to Section 11, 12 and 13.

HOUSE OF BISHOPS COMMITTEE ON THEOLOGY

Membership

The Rt. Rev. Thomas Breidenthal, Chair	Southern Ohio, V	2018
The Rt. Rev. Laura Ahrens	Connecticut, I	2021
The Rt. Rev. Larry R. Benfield, D.D.	Arkansas, VII	2018
The Rev. Dr. Kelly Brown Douglas	Maryland, III	2021
The Rev. Sathianathan Clarke, Th.D.	Maryland, III	2018
Dr. Stephen Edward Fowl	Maryland, III	2018
The Rt. Rev. R. William Franklin	Western New York, II	2021
Dr. Charles T. Mathewes	Virginia, III	2018
Dr. Beverly Mitchell	Washington, III	2021
The Rt. Rev. Allen Shin	New York, II	2021
The Rt. Rev. Prince G. Singh	Rochester, II	2021
The Rt. Rev. George Wayne Smith	Missouri, V	2018
Dr. Kathryn Tanner	Connecticut, I	2018
The Rt. Rev. G. Porter Taylor	Western North Carolina, IV	2018
The Rev. Canon James F. Turrell, Ph.D.	Bethlehem, III	2018

Ms. Jacqueline B. Winter, *Executive Director of The Anglican Theological Review*

Summary of Work

The House of Bishops Theology Commission is appointed by the Presiding Bishop and serves as a resource to the bishops as they pursue their teaching ministry in the church. At present, the committee comprises eight (8) bishops and seven (7) academic theologians.

The committee was in abeyance for the first part of the triennium. I was appointed chair by the Presiding Bishop in 2016 and began to develop a new roster of members (as usual, eight (8) bishops and seven (7) academic theologians). The Presiding Bishop made those appointments, and we met in May of 2017 in Cincinnati to get organized. We decided that our work should support and be aligned with the Presiding Bishop's call to work toward becoming Beloved Community, and we divided into three (3) subgroups to begin to develop starting points for moving forward on that basis. These subgroups focused on three (3) areas relating to racism and/or racial reconciliation: (1) historic documents; (2) narratives that shape us; and (3) scriptural, patristic and liturgical resources.

We met again in January of 2018 in New York. There we cemented our focus on racial reconciliation, building on the work of our sub-groups. We see this focus as ongoing for at least several years, as we

reflect on and seek to articulate the relation of the Beloved Community to our creation in the image of God, and to the Church as the body of Christ. In the short term, we hope to provide the House of Bishops (and any other interested parties) with easily accessible theological resources ahead of General Convention. With that in mind, we will be meeting in Chicago in May to finalize this first phase of our work.

The membership of the committee is as follows:
The Rev. Dr. Sathi Clarke – three (3) year term
The Rev. Dr. Kelly Brown Douglas - six (6) year term
Dr. Stephen Fowl – three (3) year term
Dr. Charles Mathewes – three (3) year term
The Rev. Dr. Beverly Mitchell – six (6) year term
Dr. Kathryn Tanner – three (3) year term
The Rev. Canon Dr. James Turrell – three (3) year term
The Rt. Rev. Laura Ahrens – six (6) year term
The Rt. Rev. Larry R. Benfield, D.D. – three (3) year term
The Rt. Rev. Thomas Breidenthal, *Committee Chair*
The Rt. Rev. R. William Franklin - six (6) year term
The Rt. Rev. Allen Shin – six (6) year term
The Rt. Rev. Prince G. Singh – six (6) year term
The Rt. Rev. George Wayne Smith – three (3) year term
The Rt. Rev. G. Porter Taylor – three (3) year term
Ms. Jacqueline B. Winter, *Executive Director of The Anglican Theological Review*

Submitted by: The Rt. Rev. Thomas E. Breidenthal

HOUSE OF DEPUTIES COMMITTEES

House of Deputies Committee on the State of the Church

HOUSE OF DEPUTIES COMMITTEE ON THE STATE OF THE CHURCH

Membership

The Rev. Winnie S. Varghese, *Chair*	New York, II	2018
The Rev. Ernesto R. Medina, *Vice-Chair*	Nebraska, VI	2018
Ms. Sarah E. Lawton, *Secretary*	California, VIII	2018
The Rev. Gary Commins	Los Angeles, CA, VIII	2018
Mr. Cliff Craig	Northwest Texas, VII	2018
The Rev. Kim Fonder	South Dakota, VI	2018
The Rev. Evan D. Garner	Alabama, IV	2018
The Rev. Jane S. Gould	Massachusetts, I	2018
Mr. Roger Graham	West Texas, VII	2018
The Rev. Ivette Linares	Puerto Rico, IX	2018
The Rev. Eric Metoyer	California, VIII	2018
Mr. Gary A. Moore	Central Gulf Coast, IV	2018
Mr. Brendan O'Sullivan-Hale	Indianapolis, V	2018
Ms. Laura Russell	Newark, NJ, II	2018
The Rev. Patrick F. Strohl	Central Pennsylvania, III	2018
Ms. Bonnie Weaver	Southeast Florida, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

CHANGES IN MEMBERSHIP

Mr. Cliff Craig was appointed to the committee by President of the House of Deputies Gay Jennings in November 2016.

Commission Representation at General Convention

Deputy Sarah Lawton is authorized to receive non-substantive amendments to this report.

Mandate

The mandate of the House of Deputies Committee on the State of the Church, per Canon 1.6.5(b), is to prepare and present to the next meeting of the House of Deputies a report on the State of the Church; which report, when agreed to by the said House, shall be sent to the House of Bishops. The State of the Church Committee is also charged to set the form of the Parochial Report with the final approval of the Executive Council. At the beginning of this triennium, the President of the House of Deputies charged the committee to focus on three (3) areas: Social Justice and Advocacy Ministries in the Episcopal Church, Multicultural and Ethnic Ministries, and the needs and work of the Church Pension Group and its services as they relate to the changing church.

The Commission began its work at an in-person meeting in Baltimore, Maryland, from November 19-21, 2015. We met in person for two (2) additional meetings: in Chicago, Illinois, from November 3-5, 2016, and in Seattle, Washington, from September 28-30, 2017. We also convened by video/teleconference for an additional fourteen (14) short meetings: February 11, 2016; May 5, 2016; December 12, 2016; January 9, 2017; February 13, 2017; March 13, 2017; April 10, 2017; May 8, 2018; June 12, 2017; July 10, 2017; August 14, 2017; September 11, 2017; October 9, 2017; and November 13, 2017.

The Commission was referred, and took action on, one (1) resolution from the 78th General Convention, Resolution 2015-A084, to modify the Parochial Report to include worshiping communities not reported upon previously and to expand upon the extent of mission and ministry within congregations. We proposed the following change to the Parochial Report for 2017: languages used in worship, emerging worshipping communities, activities other than Sunday services and direct outreach. This addition was accepted by the Executive Council at their June 2017 meeting and is in included in the most recent version of the Parochial Report.

Summary of Work

OVERVIEW

The mandates to the committee are focused on areas that reflect the rapidly changing context of The Episcopal Church. The report on overall membership, stewardship, and average Sunday attendance, which can be found here https://www.episcopalchurch.org/research-and-statistics, tells a story of modest decline in relation to the recent past, a story of radical decline when compared to the post-World-War-II heyday of the 1950s and early 1960s, and a profound and shocking decline when compared to the growth in population of the United States. In 1960, the population of the United States was one hundred and eighty (180) million. It is now three hundred and twenty-six (326) million.[1] The parochial report data, when compared to the population of the United States which grows by one (1) person every fifteen (15) seconds, tells us that we are roughly 0.5% of the population of the United States in 2016.

From the census site you can also see in what regions of the country the population is growing; who we are as a nation by gender, as the census records gender; and who we are becoming as a nation by race and immigration, again as the census records such. These are descriptive, not proscriptive facts about The Episcopal Church in the U.S. context. We are not here offering census data on those parts of the Episcopal Church outside of the U.S., which tell their own stories of migration and population shifts.

One of the interesting issues that the census does point us toward is that we are growing by births, which just barely outpace deaths in the United States, but we continue to grow even more quickly by

immigration. The charge to look at the state of Ethnic and Multicultural ministries is timely. As a Church, more and more of our congregations are visibly diverse, and we must equip ourselves to minister effectively in contexts in which there are multiple social norms, and the weight of discrimination and privilege in society present themselves to us in our congregations.

The Episcopal Church has a strong history of speaking both practically and prophetically as "tall steeple" churches and community leaders in the public square. That work is ably led at the national level by the Office of Government Relations and informed by the General Convention. The committee explored how we might better connect, communicate and strengthen the usually local work of service and advocacy with the historic influence of The Episcopal Church for these deeply troubled and divisive times.

This report attempts to look at the new realities of part time, bi-vocational, and non-stipendiary clergy filling key leadership roles in congregations, often as the solo priest. This is not a new way of being the Church, but it has not been the "norm" for some time, and that appears to be changing. There are implications for our Pension Fund and its products as the expectations of full time, compensated employment for clergy in the Episcopal Church changes. In addition, the rapidly changing healthcare landscape in the United States has placed the Episcopal Church's attempts at parity in an entirely different landscape than when they were first envisioned. It is time to revisit what we mean by parity.

Finally, the committee came to the conclusion that the Parochial Report needs a substantial overhaul. Statisticians tell us "we value what we measure." It seems clear that our local understanding of vitality is not yet adequately recorded, reported and communicated by the current Parochial Report. We ask the next State of the Church committee to propose substantive changes to the Parochial Report to center its questions on what we as Episcopalians believe to be signs of faithfulness in our congregations by identifying data and methods of obtaining and sharing that data that are the most useful to congregations, dioceses and seekers; and reported through the Episcopal Asset Map.

ETHNIC AND MULTICULTURAL MINISTRIES

For the purposes of clarity, we have chosen to define Ethnic and Multicultural Ministries under the titles assigned by The Episcopal Church Center. These include: Latino/Hispanic Ministries, Asian Ministries, Black Ministries, and Native American Ministries.

Our work began with an exploration of how each of the Ethnic and Multicultural Ministries began in official roles out of The Episcopal Church Center. We interviewed Church leaders to learn about the recent and current dynamics and strategies of the various ministries. Finally, we sought to understand the current direction of church leadership with respect to Ethnic and Multicultural Ministries.

Our most important finding is that racism is active within the structures of The Episcopal Church [TEC]. The Ethnic Ministries of The Episcopal Church are as defined by the values of the larger culture as any other ministries.

The genesis of each of the ministries, although unique, share the reality that each was founded on the Doctrine of Discovery rather than a model of shared and mutual ministry. The significant consequence is that work with what is seen as marginalized communities are "siloed" by limiting definitions of race or ethnicity, and have not had the freedom to move across categories to fully develop and share the gifts diverse communities bring to the Episcopal Church.

History

"The Episcopal Church has been involved in ministry, particularly health and education programming, among Black and Native American communities since the nineteenth century."[2] This statement by TEC accurately describes the perception of the Church's outreach to people of color in traditional missionary terms of ministry to those people: bringing the Gospel of Jesus Christ to these communities and building agencies and institutions to provide for health care, education and social welfare, from the dates of the first ordained clergy charged with serving them (the Rev. Absalom Jones (deacon 1795, priest 1804) and the Rev. Enmegahbowh (deacon 1859, priest 1867). The clergy served the people of the Church through their work as ministers and community leaders; however, advocacy of and by the communities was carried out outside the formal structure of the Church. In the African American Church, the Conference of Church Workers Among the Colored People [CCWACP] was founded in 1883 by the Rev. Alexander Crummell, and the Rev. Winston Ching led the founding of the Episcopal Asiamerica Ministry in the 1970s. These and other groups became advocates for their particular communities outside the formal Church structures.

Within the TEC structure, the Civil Rights' Movement of the 1960s led the Episcopal Church's Executive Council to "shape policy toward ethnic minority communities."[3] Funding from General Convention supported work of ethnic commissions whose members were appointed by Executive Council and General Convention and supported by a staff officer (for the purpose of this report, these multi-cultural missioners are referred to as 'ethnic desks,' a term widely used within the structures of the Church). Each of the four (4) commissions, overseeing Black, Native American, Hispanic and Asian ministries, were chartered under what came to be called the Standard Ethnic Charter of the Executive Council. The charter directed funding to and policy toward the ethnic minority communities in TEC. Meanwhile, advocacy for these minority communities remained outside Episcopal Church offices in groups such the Union of Black Episcopalians [UBE] (UBE, successor to CCWACP).

More Recent History

Clearly our Church has been a prophetic voice in calling out the sin of racism in our society. Through our governing structures and offices, we have studied, prayed, preached and written pastoral letters

speaking against racist events in our communities. Our Church leaders post on a variety of social media the shock of how racism is active around us and how it is necessary to preach against this sin. And yet little is heard when it comes to exploring the realities within our own Church. Here are just a few of our observations:

- Our biases inform our outreach in mission and ministry, and our churches, as a whole, do not reflect the diversity of their local communities.
- Clergy from non-dominant cultures continue to face unequal access to theological education, unequal compensation, and unequal training and continuing education.
- The current structure of the Ethnic Ministries Offices of the Episcopal Church assume that each office serves a unified community, failing to allow for the multinational, multilingual and multicultural contexts of each area.
- The distinct contexts of the non-U.S. dioceses in the Episcopal Church are not adequately supported in our current structures.
- Mutuality of exchange of gifts, skills, grants and financial gifts are necessary for healthy ministries, but the way the work has been structured historically, and the way we tend to tell our stories, assumes that gifts flow from the dominant to "ethnic" ministries.
- We rarely acknowledge that, while it has been the dominant ecclesiastical culture, the white part of the Church is also "ethnic ministry." We all bring our ethnicity(ies) to the Table.

Signs of Hope

In the Presiding Bishop's "The Beloved Community" plan, we see progress toward understanding the complexity and need for mutuality in Ethnic and Multicultural Ministries. By asking the question, "Where is Jesus in this community?" we shift from the assumption that we are bringing Jesus to the assumption that Jesus is already there with and in the people.

We made interesting discoveries during our interviews with the four (4) Multicultural Missioners. On one hand, we found that their current job frameworks and mission structures are not designed to share the gifts of the staff, leadership and communities from non-dominant cultures with each other or the rest of the Church. The structures have been historically designed to hold each program as a distinct area, to fold into the dominant culture, not share back. On the other hand, the four (4) Missioners understand that each is individually ministering to diverse communities, diverse groups of nationalities and cultures. The result has been the development of strong skills of how to successfully deal with a pluralistic community. This is a skill set greatly needed by the Church as a whole.

In addition, we discovered that these communities, which are in many ways marginalized, also offer distinctive skills/gifts:

1. Ministry among diverse populations.
2. Highly developed collaborative skills.

3. Tools for the empowerment of the laity.

It is important that structures and processes be created to bring mutuality in sharing to the wider Church. The Episcopal Church has gifts for collaborative ministries across cultures—truly multicultural ministry. Our church wide staff are uniquely positioned to identify, share and support these opportunities for learning as the wider Church. Additionally, the current staff structures do not take advantage of the unique position for advocacy that The Episcopal Church's ethnic missioner positions make possible. A holistic vision of mission, program, and social justice advocacy invites The Episcopal Church to use the breadth and depth of its connections in community for justice.

Coming to Terms

The committee believes that the Church is called to a more radical inclusiveness as an institution.

For many generations, The Episcopal Church has thrived in multicultural churches and communities, but we have hidden the light of these communities instead of bringing them to the center of Church life. The Episcopal Church can do much more in exploring the abundance of God's grace found in others, especially when it takes us out of our comfort zones, a Church that over the decades has moved forward in grace one step at a time.

At the end of this report, we offer several resolutions to strengthen Ethnic and Multicultural Ministries. These are focused as steps that can be taken on the church wide level, recognizing that there also needs to be articulation of this work from our Church wide structures to our dioceses and congregations in their local contexts. These resolutions are far from comprehensive; they will not solve the sin of racism for our Church. We propose our resolutions as practical and doable steps of commitment on a long journey that has already been undertaken and will go on for a long time, a journey that can begin to help us open up the deep gifts of developing bridges and mutual accountability and communication.

SOCIAL JUSTICE AND ADVOCACY WORK OF THE CHURCH

The Social Justice and Advocacy subcommittee explored the commitment and involvement of the wider Church and our congregations in social justice. To this end, we spoke to various staff at The Episcopal Church Center and electronically distributed a survey seeking to discern what dioceses and parishes were doing in furtherance of social justice ministries. In this survey, we asked respondents to think about distinguishing between charity and justice work (understanding that some programs have elements of both), and also making distinctions among work that the congregation created and nurtured, work that was being done by individuals in congregations, and work that utilized congregational space.

Theology of Social Justice

In our survey of the Church, we discovered that definitions and understandings of "social justice" vary broadly. We heard from many congregations with ministries that would traditionally be called "charity" as compared to "justice;" we defined justice work as acts to address and heal the root cause of the injustice which prompted our need for charity in the first place. This distinction caused anxiety for some who filled out the survey, both in terms of trying to define charity work as "justice" and from some who do not believe the Church should be doing justice work. Comments in response to our survey stated with some frequency that the Church should "remove itself from politics and get on the work of social justice." Bishop Barbara Harris has commented that the Church tends to confuse the charge of the prophet Micah as we "love justice and do kindness." In preaching, teaching and praying, we use prophetic language about doing God's work of justice; yet responses to our social justice survey suggest that our actions across the Church tend to fall more often into the realm of alleviation of suffering and the work of charity than the work of justice.

Speaking about justice work, Archbishop of Canterbury Justin Welby said, "When Christians speak in public about community flourishing or about justice, there's always someone who will pop up and ask why we're sticking our noses in, as if these things were miles away from the proper concerns of Christianity…Stick to God, we are told. So we do, and we find not only the passages I have mentioned, but Jesus saying: Love God, love neighbour…The common good of the community and justice are absolutely central to what it means to be a Christian." And furthermore, "We don't speak about common good and justice because we think we have some automatic right to be heard," he said, "but because loving our neighbor places responsibilities upon us. We have responsibilities to speak, even when it might be easier to stay quiet, to point to injustice and to challenge others to join us in righting it."[4]

Nevertheless, we heard anxiety from the grassroots of the Church and, to some extent, a sense of being disconnected from the words of the wider Church and General Convention on the theology of social justice. For example, some felt that social justice preaching should not advocate a particular view on reform or that the emphasis should be on "outreach ministry" but not social justice. We heard concerns that social justice is "only about politics." In our Church wide discussions, we talk about justice in terms of promoting social change and responding to long-term needs in combination with work to alleviate the suffering before us.

For example, we have many important congregation-level food pantries, which help to alleviate hunger for a short period of time (a week or a month), but we also provide funding for an Episcopal Public Policy Network and several statewide coalitions that advocate for systems-level change to address hunger. These networks call on Episcopalians to advocate for strong public benefits such as school meals and food benefits for families in poverty and for better minimum and living wage policies so that working families do not run out of food money before the end of the month. In the survey, we did not see many responses connecting these two (2) types of ministries.

Social Justice Ministries of the Church

The survey was helpful in encapsulating our existing social justice ministries at the local and diocesan levels. The survey was disseminated to every diocese, and then forwarded to all congregations through their dioceses. We received one thousand two hundred and eighty (1,280) responses from congregations. Of these, thirty-two (32) percent reported social justice ministries in their congregations. The vast majority of churches reported on charitable ministries such as food pantries, thrift shops and shelter ministries. Justice ministries included advocacy work for immigrants, refugees, and the homeless; advocacy centers to assist with public benefits, health care, and wage reform; yoking with public schools and a focus on education reform; and work to reduce mass incarceration. The social justice ministries as reported were diverse, with no one kind of work predominating; the amount of each kind of work was overall very small.

According to the survey responses, our social justice ministries tend to be lay-created and lay-led; very few were reported as having been created by clergy. However, although we are doing many different types of work, social justice work is not robust across the Church. If we extrapolate the answers to the wider Church, with a ten (10) percent margin of error, just thirty-two (32) percent of congregations have an active social justice ministry.

Many of the respondents noted their congregations are trying to do this work. They described their congregations as small but wanting to help; many of those who are doing social justice work are joining with other congregations (some from other denominations and other faiths in community organizing networks) to make a difference. The survey respondents are eager for resources, suggestions and people to reach out to for help. Almost all who responded acknowledged a need for this work and many a desire to do it. They wanted to connect with others doing this work but did not know how to find them.

Other responses showed disconnectedness between the layers of the Church. For example:

- Only a few respondents used the resources of The Episcopal Church Center or knew what they were, with only twenty-nine (29) percent finding them useful.
- Few believed General Convention resolutions informed their work, with only twenty-two (22) percent stating they were helpful for their ministries (though many acknowledged having no knowledge of particular resolutions).
- Over fifty (50) percent stated that the Church needs more social justice resolutions from General Convention.
- Many others stated that there should be more public awareness of General Convention and the work of The Episcopal Church on public policy and social justice resolutions.

- Most who answered indicated they do not have a clear understanding of the work at The Episcopal Church Center or to whom they might reach out with questions.
- A few who answered thanked organizations that work in the social justice field on a national level, including official offices and networks of TEC such as the Office of Government Relations and the Episcopal Public Policy Network, as well as groups outside the official structures such as the Episcopal Peace Fellowship and the Episcopal Network for Economic Justice.
- Many sought a clearinghouse of resources and knowledge to assist in their ministries.

Here is one vivid example of the disconnectedness between what the Church says and what the congregations know about what the Church says: One congregation stated they did work with immigrants and also stated that General Convention did not pass resolutions that helped their work. The same respondent urged General Convention to pass more resolutions relating to immigration. A quick search of the Episcopal Archives reveals thirty-nine (39) resolutions on immigration that have been passed by General Convention. It seems that the resolutions passed by General Convention may not have been communicated to the people in the pews. The survey responses also indicated a hunger for more information and more communication about the work that is being done both on the Church wide level and by other congregations across the Church. Resolutions to strengthen Church wide support of social justice work, create a task force with a charge to study our Church's theology of social justice and an amendment to the Rules of Order to task deputies with reporting the work of General Convention to their dioceses can be found at the end of this report.

CHURCH PENSION AND DENOMINATIONAL HEALTH PLAN

One of the three (3) areas that our committee explored was the extent to which the Church Pension Group is meeting the needs of The Episcopal Church [TEC] in the 21st century. In that process, many questions have been raised: Do the investments and business methods of the Church Pension Group [CPG] reflect the values of the Church? Did the establishment of a mandatory lay pension system achieve parity between lay and ordained church workers? Does the Denominational Health Plan [DHP] serve a useful purpose since the Affordable Care Act has been enacted? We summarize our findings below and propose two (2) resolutions as a result.

Socially Responsible Investing

There appears to be a considerable gap between the General Convention's expressed values and some of the specific investments held by the Church Pension Fund [CPF]. While CPF is to be commended for making a major commitment to investments with a positive social impact, CPF has declined to consider requests for divestment from companies or industries whose activities may be contrary to the teachings of our faith, reflecting a gap in both communication and questions of how the values of the Church are expressed in the use of its funds. These gaps, and the responses of the General Convention,

the Domestic and Foreign Missionary Society [DFMS], and CPF to them, suggest that there are deeper issues of collaboration, authority and responsibility that have not been adequately addressed.

In conversations on these topics, CPF appeals to its fiduciary obligation to plan participants. CPF correctly points out that the assets held in the plans are not assets of TEC but rather are assets held in trust for the benefit of current and future retirees; therefore, CPF would be remiss to invest in a manner that jeopardizes its ability to make good on its obligations to retirees. With respect to socially responsible and impact investing, CPF is willing to commit plan funds to such investments only to the extent they are expected to offer returns commensurate with or superior to other market opportunities.

CPF has made considerable efforts to align a significant portion of its assets with issues of interest to TEC. Currently approximately $1 billion of the fund's assets are invested in opportunities expected to offer both attractive investment returns and a positive social impact. The small scale of many of the individual investments that comprise this portfolio means it takes a serious commitment of resources to build and maintain a portfolio of this size and CPF is to be commended for its efforts.

Additionally, CPF, in partnership with the Executive Council Committee on Corporate Social Responsibility and other ecumenical bodies, uses its influence as a direct shareholder of publicly traded companies to influence corporate activity around issues of climate change, corporate board diversity, and human trafficking; through direct corporate engagement and proxy voting. As an example, senior staff described to us interactions they had with one (1) portfolio company, an airline, to convince them to adopt policies to help identify passengers who may be victims of human trafficking.

Taken together, the pool of individually held stocks that allow opportunities for shareholder engagement and the positive impact portfolio amount to around twenty (20) percent of CPF's assets. With its remaining assets, CPF makes no affirmative effort to ensure funds are invested with an eye to advancing the values of the Church. This stance is not limited to CPF, but reasonably represents the Church's overall investment approach. Indeed, CPF notes that though it offers a socially responsible fund option focused on U.S. equities within its defined contribution plans, only about five (5) percent of plan participants invest in this fund. As with the defined benefit plan, the behavior of defined contribution plan participants reflects the competing goals of values investing and retirement readiness.

For its part, the Church needs to do a better job at clearly articulating what values it expects to be expressed through the investment portfolio. To date, the will of General Convention has been expressed in piecemeal resolutions on corporate engagement or divestment related to companies including but not limited to those profiting from the Israel/Palestine conflict, fossil fuel extraction and private prisons. While piecemeal approaches may always be necessary to some degree because emergencies come up, the Church can and should be able to articulate an overarching vision of how

its values should be reflected in investments it or its agents make. This should be articulated in a fashion executable by professional investors, with appropriate flexibility to allow for various strategies such as divestment, corporate engagement or other approaches to maximize the desired impact; and include a reporting mechanism back to the Church. The guidelines should be informed by the experience of other religious and secular institutions seeking to align their investments with their values. Finally, in articulating a values-based investment philosophy, the Church must offer compassionate and practical pastoral guidance to both its members and the broader public whose livelihoods depend on industries or companies identified for some form of investment action. This committee proposes a resolution establishing a task force to create such investment guidelines, whose membership should ideally include representatives of CPF and stakeholders of other major church investment pools, and should include expertise in the legal issues at hand.

In order for productive conversation to happen around these topics, it is important for deputies and other interested parties to fully understand CPF's point of view. In an environment where most headlines about pensions are about how future benefit obligations dwarf the ability of their assets to pay them, the clergy pension plan is in surplus according to GAAP, and the lay plan is near full funding. CPF management observes that the particulars of our plan demographics mean that GAAP overstates the value of the clergy plan surplus, but in any event it is safe to say that the Church's pensions are in far better financial shape than in the pension world at large.

Senior CPF staff insist that protecting the plans' strong financial position is of paramount importance in order to keep the promises made to the plans' beneficiaries, and they have good reason for their position. Underfunded secular pension plans can appeal to the deep pockets of a corporate plan sponsor or the tax base of a municipality to make up funding shortfalls, or at the worst can rely on the Pension Benefit Guaranty Corporation [PBGC] to insure against a total loss for beneficiaries in the event of plan failure. As a church plan, our plans are exempted from both the requirements and protections of PBGC, and TEC and its constituent entities are not in a sufficiently strong financial position to make up a potential funding shortfall. In other words, other than the eighteen (18) percent and nine (9) percent contributions to the clergy and lay plans, respectively; CPF is operating without a net in the event of a shortfall. Therefore, CPF desires maximum flexibility with respect to its investments in order to minimize the probability of such an event.

Fiduciary obligation is generally defined as maximizing return for a given level of risk, with risk generally defined as a particular level of volatility of returns. For the Church, risk might also reasonably include using assets invested in our name in a way that compromises our commitment to the teachings of our faith. There is also a secular argument for using ESG standards in investing, under the theory that companies participating in destructive industries, subpar governance or labor standards, should generally be worse investments over the long term. Actual data on this point is inconclusive.

CPF's stated return target is CPI+4.5%. Investment success for CPF is therefore not maximum possible return; so long as church entities make the eighteen (18) percent contribution and the CPF achieves an average annual return of CPI+4.5%; CPF should be able to meet its obligations, assuming its actuarial assumptions are correct. A return above this level is desirable to provide a cushion to allow the fund to continue to pay benefits at the level promised during adverse economic environments such as the Tech Bust or the 2008 Global Financial Crisis, and to absorb potential future changes in actuarial assumptions, such as adjustments for changing lifespans. Additionally, to the extent that a reduction in the eighteen (18) percent assessment level while maintaining the same level of benefits is ever possible, there is no other possible source other than sustained outperformance of CPF's stated return target. However, we are not persuaded that outperforming the stated return target requires maximizing the clergy plan's investment return at the cost of failing to act out the disciplines of the Christian faith in all aspects of our common life.

With respect to meeting the stated needs and goals of the current pension system, we note with deep gratitude and appreciation the work of CPF. We also see a need for greater clarity in understanding the relationship between CPF and the Church. In a resolution presented below, we recommend the creation of a task force, whose members would be appointed by the Presiding Officers, to study and report upon the issues of collaboration, authority and responsibility between CPF and The Episcopal Church that are touched upon here, with recommendations the 80th General Convention for improving, clarifying or effecting changes in that relationship going forward.

Pension Parity

In 2009, the General Convention established a mandatory lay employee pension system through Resolution 2009-A138. Although this was an important step toward the full valuation of lay church workers by TEC, the lack of parity between the pension and related benefits of lay and ordained church workers persists.

In addition to this disparity, our committee also notes the lack of parity between the pensions of domestic and non-domestic Church workers and the fact that the current pension structure, which is based on a purely income-replacement model, perpetuates and reinforces in retirement the disparities of income incurred during active ministry, which are often manifest across gender and racial or ethnic lines. With an income-replacement model, these disparities in compensation produce proportionally disparate pensions.

During this triennium, we received survey responses from over one thousand three hundred (1300) Church workers (primarily deputies and bishops). In that survey, twenty-four (24) percent were very supportive, twenty-one (21) percent were slightly supportive, and twenty-four (24) percent were neutral towards a proposal to change the way that future pensions are calculated so that greater parity exists across income differences. The survey found that ten (10) percent were slightly

unsupportive and twenty-one (21) percent were very unsupportive of such a change. While not a clear mandate, this response has encouraged us to call for the exploration of new pension models that address ways in which the current model reinforces in retirement the income disparities incurred during active ministry.

We recognize that a call for true parity would represent a change in the stated goals of the pension and therefore must come from the General Convention. To that end, we recommend that the pension task force referred to above be given a second charge of exploring in depth; the lack of parity between lay and ordained Church workers, between domestic and non-domestic Church workers, and between Church workers of disparate incomes with a particular focus on how those disparities are manifest across gender and racial or ethnic lines. We encourage this task force to work with the Trustees and officers of CPF to develop new models for the pension system that are not necessarily focused purely on income replacement and to present those models to the next General Convention.

Denominational Health Plan [DHP]

In 2009, the General Convention called for the creation of the DHP through Resolution 2009-A177 with the stated goals of achieving cost containment and providing equal access to health care benefits for eligible clergy and lay employees, who were defined as those who worked at least one thousand five hundred (1500) hours per year. Since then, participation has grown to include all domestic dioceses, but not all parishes and dioceses have benefited. Our survey showed that twenty (20) percent of respondents who have health insurance through the Church Medical Trust wish that they could participate in a medical plan outside the DHP.

The Church Pension Fund reports that seventy-five (75) percent of dioceses have premium rates that are at or near the average for all DHP participants (from five (5) percent above to ten (10) percent below). The other twenty-five (25) percent pay premium rates that are lower than the average because they represent geographic areas where substantially lower costs could be attained outside the DHP. Furthermore, CPF reports that, when compared with plans available on the marketplaces created through the Affordable Care Act, ninety (90) percent of dioceses have competitive rates, and the remaining ten (10) percent pay no more than tem (10) percent more than rates available through the marketplace.

Our survey showed that the DHP has had other negative consequences. Of respondents who work for a church or church-related organization that provides health insurance through the Church Medical Trust, thirty (30) percent report reductions in the number of positions or compensated hours of paid positions as a direct result of Resolution 2009-A177.

At this point, however, we do not think that any legislative action is necessary. The Affordable Care Act has changed the landscape for health insurance, and it may be that in the future the DHP will no

longer serve a meaningful purpose, but, for now, despite acknowledging its limitations, we believe that it is beneficial for the whole Church.

Proposed Resolutions

RESOLUTION A053: DESIGN A NEW PAROCHIAL REPORT

Resolved, the House of ___ concurring, that the 79th General Convention charge the House of Deputies Committee on the State of the Church to work with the Office of the General Convention and Executive Council to design a new parochial report appropriate to the current context of the Episcopal Church including but not exclusive to multicultural congregations; aging populations; outposts of ministry in challenging economic contexts; and creative use of space and local engagement, to be administered and shared in networked, visible tools such as the Episcopal Asset Map.

RESOLUTION A054: AN OFFERING OF PRAYER FOR THE WHOLE CHURCH

Resolved, the House of ___ concurring, that the 79th General Convention invite the multicultural ministers of the Church who are tasked with supporting the work of the Church's Black, Latino/Hispanic, Asian American and Native communities to work with liturgists and ministers in their communities to create a small book of prayer, liturgy and music as a gift for the Church in recognition and witness to the presence of Christ in all of our communities, traditions, and cultural expressions, knowing that as we live, we pray, and that as we pray, we live; and be it further

Resolved, That the book they produce be presented to the 80th General Convention for use by the whole Episcopal Church; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $15,000 for the implementation of this resolution.

RESOLUTION A055: DEVELOP MULTICULTURAL MINISTRY PATHWAYS

Resolved, the House of ___ concurring, that the 79th General Convention invite the multicultural ministers of the Church center to further develop channels and pathways for sharing the gifts of ministry that exist in abundance in our Black, Latino/Hispanic, Asian American and Native communities with the wider Church, such as: an expanded New Communities gathering; regional or provincial trainings for ministry development officers, to share best practices for multicultural leadership development; and new channels for sharing the gifts of lay-led multicultural ministry that are already well-developed in the dioceses of Province IX and in outlying communities throughout the Church; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $100,000 for the implementation of this resolution.

RESOLUTION A056: CREATE TASK FORCE ON THEOLOGY OF SOCIAL JUSTICE ADVOCACY AS CHRISTIAN MINISTRY *Resolved*, the House of ____ concurring, the 79th General Convention direct the Presiding Officers of The Episcopal Church to appoint a Task Force on the Theology of Social Justice Advocacy as Christian Ministry, consisting of three (3) bishops, three (3) presbyters or deacons, and six (6) lay persons, who represent the diversity of the Church, to be tasked in this triennium to consider scripture, approved liturgical resources, other theological texts and previous actions of General Convention to summarize the ways in which The Episcopal Church understands the work for social justice as essential mission and ministry of the Christian Church; and be it further

Resolved, That the Task Force study how The Episcopal Church currently fosters theological understanding and leadership for social justice, and recommend ways to foster theological and practical conversation across the Church on this topic; and be it further

Resolved, That the Task Force be directed to report its findings and recommendations to the 80th General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of $15,000 for the implementation of this resolution.

RESOLUTION A057: STRENGTHEN STAFF RESOURCES FOR NETWORKING

Resolved, the House of ____ concurring, the 79th General Convention support the continued and additional strengthening of Church wide staff resources and collaboration to support the grassroots work of The Episcopal Church in the areas of social justice advocacy and ethnic and multicultural ministry across The Episcopal Church.

RESOLUTION A058: ENCOURAGE USE OF ASSET MAP

Resolved, the House of ____ concurring, the 79th General Convention challenge all congregations to fully complete their profile on the Episcopal Asset Map, a joint project of The Episcopal Church and Episcopal Relief & Development; and be it further

Resolved, That the House of Deputies State of the Church Committee analyze the Episcopal Asset Map and report on the level of engagement of social justice ministries by congregations within The Episcopal Church.

RESOLUTION A059: AMEND HOD RULES OF ORDER III - ADDITIONAL DUTIES OF DEPUTIES

Resolved, That the House of Deputies hereby amends the Rules of Order to add III.C.1-4:

(C) Duties of Deputies

1. *Deputies shall be required to report to their Diocese within sixty (60) days after General Convention the legislation passed which is of interest to congregations in their Diocese. Deputies shall prepare a report, in an understandable format, outlining passed legislation and other topics of importance to the Diocese and shall disseminate this report to all congregations within the Diocese.*

2. *Deputies shall put forth at their Diocesan Convention all General Convention legislation that should be adopted at the Diocesan level, and report to the Office of General Convention on the status of such legislation.*

3. *Deputies shall continue to be a resource to their Diocese for information on legislation passed at General Convention until such time as a new deputation is elected.*

4. *Deputies shall serve as a conduit to their Dioceses of any items of importance disseminated by the President of the House of Deputies until such time as their successors are elected.*

And be it further

Resolved, That pursuant to Canon I.1.2, this will remain in force until amended or repealed by the House.

RESOLUTION A060: CREATE A TASK FORCE TO STUDY CHURCH'S PENSION SYSTEM

Resolved, the House of _____ concurring, That the 79th General Convention direct the Presiding Officers of The Episcopal Church to appoint a Task Force on the Church's Pension System consisting of three (3) bishops, three (3) presbyters or deacons, and six (6) lay persons, and that at least one (1) of the persons appointed to the Task Force be knowledgeable and experienced in the governance and structure of The Episcopal Church; at least one (1) of the persons appointed to the Task Force be knowledgeable and experienced in corporate and not for profit structures and governance; and at least one of (1) the persons appointed be knowledgeable and experienced in the law, structure, and/or governance of pension plans; and be it further

Resolved, That the Task Force be directed to study

- the history of the creation of The Church Pension Fund with an emphasis on its historical relationship to The Episcopal Church and the Church's involvement in its creation;
- its current structure, governance, and relationship to The Episcopal Church including but not limited to the right of the General Convention to direct The Church Pension Fund;
- the obligations and responsibilities of The Church Pension Fund owes The Episcopal Church;

- the ownership of the data provided by various persons and organizations of the Church to The Church Pension Fund in its capacity as the Recorder of Ordinations;
- the extent of the Church's right to set the terms and provisions of the pension plans and other benefit programs provided by or administered by The Church Pension Fund or any of its affiliates;
- the authority of the General Convention to limit or expand the businesses engaged in by The Church Pension Fund or any of its affiliates including providing products or services to groups or individuals not associated with The Episcopal Church;
- and such other issues as the Task Force identifies during its work; and be it further

Resolved, That the Task Force study the governing documents of The Church Pension Fund and all its affiliates, consult with the Board of Trustees and individual Trustees of The Church Pension Fund as well as its staff, consult as needed with legal, corporate, not for profit or pension experts; and be it further

Resolved, That the Task Force be directed to report to the 80ᵗʰ General Convention and make any recommendations it deems necessary including, but not limited to, recommendations for improving, clarifying or effecting changes in the relationship between The Church Pension Fund and The Episcopal Church; and be it further

Resolved, That the Task Force also be directed to study the current state of parity between the pensions of lay and ordained church workers, domestic and non-domestic church workers and church workers of disparate incomes with a particular focus on how those income disparities are manifest across gender and racial or ethnic lines; and to present to the 80ᵗʰ General Convention the specific ways in which the current pension system does and does not reflect parity across the church; and be it further

Resolved, That the Task Force be directed to seek input from the Trustees and officers of the Church Pension Group on new models for the pension system that would achieve true parity; and to present to the 80ᵗʰ General Convention its recommendation on the adoption of new models for the pension system that would achieve better parity; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of $50,000 for the implementation of this resolution.

RESOLUTION A061: CREATE A TASK FORCE ON THEOLOGY OF MONEY

Resolved, the House of ___ concurring, That the 79th General Convention direct the Presiding Officers of The Episcopal Church to appoint a Task Force on the Church's Theology of Money, consisting of four (4) bishops, five (5) presbyters or deacons, and six (6) lay persons, who represent the diversity of the Church; and be it further

Resolved, That the Task Force be directed to use scripture, approved liturgical resources, other theological texts, and previous actions of General Convention to summarize the ways in which The Episcopal Church values money and other resources of financial value; and be it further

Resolved, That the Task Force be directed to study the investments and other assets of the Episcopal Church, including but not limited to the holdings of the Church Pension Fund, to discern ways in which those investments and assets reflect the Church's theology of money; and be it further

Resolved, That the Task Force be directed to study the business practices used throughout the Church, including but not limited to the Office of the General Convention, the Executive Council, and the Church Pension Fund, and to discern the ways in which those practices reflect the Church's theology of money; and be it further

Resolved, That the Task Force be directed to present its findings and recommendations to the 80ᵗʰ General Convention; and be it further

Resolved, That the 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.

Endnotes

[1] https://www.census.gov

[2] Historical Report on Ethnic Ministries May 20, 2016, The Archives of the Episcopal Church. Privately published document, Copyright 2016. The Archives of the Episcopal Church, DFMS p1

[3] Historical Report on Ethnic Ministries May 20, 2016, The Archives of the Episcopal Church. Privately published document, Copyright 2016. The Archives of the Episcopal Church, DFMS p1

[4] Archbishop of Canterbury Justin Welby, Keynote Address to the "Tackling Poverty Together" Conference of the Church Urban Fund, Old Town Hall, Stratford, London, UK, November 13, 2013. http://www.archbishopofcanterbury.org/articles.php/5181/seeking-justice-is-absolutely-central-to-christian-faith-says-archbishop

TASK FORCES OF GENERAL CONVENTION

Advisory Council on the Stewardship of Creation

Advisory Group on Church Planting

Committee to Study the Relationship of the General Convention and the General Theological Seminary

Task Force for Latino-Hispanic Congregational Development and Sustainability

Task Force on Clergy Leadership Formation in Small Congregations

Task Force on Leveraging Social Media for Evangelism

Task Force on Review of PB Election and Transition Process

Task Force on the Episcopacy

Task Force on The Episcopal Church in Cuba

Task Force on the Study of Marriage

Task Force to Study Church Leadership and Compensation

Task Force to Study Dual Call Couples

Task Force to Study Provinces

Task Force to Update Sexual Misconduct Policies

ADVISORY COUNCIL ON THE STEWARDSHIP OF CREATION

Membership

The Rt. Rev. Marc Handley Andrus, *Co-Chair*	California, VIII	2018
The Rev. Stephanie Johnson, *Co-Chair*	Connecticut, I	2018
Mr. Paul Anton	Minnesota, VI	2018
The Rev. Jerry Cappel	Kentucky, IV	2018
The Rev. Patrick Funston	Kansas, VII	2018
The Rev. Luis Alberto Garcia Correa	Dominican Republic, IX	2018
The Rev. Esther Georges	The Virgin Islands, II	2018
Ms. Perry Hodgkins Jones	Atlanta, IV	2018
The Rev. Martha Kirkpatrick	Delaware, III	2018
The Rev. Nurya Love Parish	Western Michigan, V	2018
Ms. Kelly Phelan	Los Angeles, VIII	2018
Mr. Peter A. Sergienko	Oregon, VIII	2018
Dr. Andrew R. H. Thompson, Ph.D.	East Tennessee, IV	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018
Ms. Julia Ayala Harris, *Liaison of Executive Council*	Oklahoma, VII	2018

CHANGES TO MEMBERSHIP

The Rev. Luis Alberto Garcia Correa, 2018
The Rt. Rev. John S. Smiley, 2018 *(Resigned)*

REPRESENTATION AT GENERAL CONVENTION

The Rt. Rev. Marc Andrus, the Rev. Nurya Love Parish and the Rev. Patrick Funston are authorized to receive non-substantive amendments to this report at General Convention.

Mandate

2015-A030 Support Ecologically Responsible Stewardship of Church Property

Resolved, **That the Domestic and Foreign Missionary Society is directed to implement a program to develop parish and diocesan resources designed to support local ecologically responsible stewardship of church-related properties and buildings. The program shall be implemented in cooperation with an Advisory Council on the Stewardship of Creation composed of one (1) person from each province by April 1, 2016. Each province member of the Advisory Council shall convene, in their respective provinces, Regional Consultative Groups ("RCGs") on the Stewardship of Creation. Each RCG shall be comprised of no fewer than five (5) experts in areas of environmental sustainability appropriate to the demographic, ecological, cultural and geographic specifics of each**

region. These should include, but not be limited to, consultants in food and water security, property development, alternative energy, and engineering. Each RCG will also include theologians, educators and liturgists to provide resources in education and formation. These RCGs shall:

> 1. Compile and develop theological and formational material for teaching the theology of stewardship of creation;

> 2. Create networks designed to share ideas and information for practical application among the regions, such as sustainable development and green conversions of church- related properties, including without limitation, energy audits, solar conversions and other alternative energy, community gardens, and development of fallow property;

> 3. Be available for consultation to the Dioceses and Parishes.

The Advisory Council on the Stewardship of Creation shall create a structure for allocation of money to fund RCG initiatives at Parish and Diocesan levels within a year of the 78th General Convention, and serve as the granting body; and be it further

Resolved, That the Advisory Council shall report back to the 79th General Convention on the progress and ongoing results at the local and provincial levels.

Summary of Work

MEETINGS:

The Advisory Council first met in New York City, New York on July 19, 2016 and again in person in Healdsburg, California on May 15, 2017. Additionally, The Council held six (6) teleconference calls in the eighteen (18) months from its first convening and the submission of this report in December 2017. The Council will meet in person again in the Spring of 2018 ahead of the 79th General Convention.

INTRODUCTION

In September 2016, Presiding Bishop Michael Bruce Curry identified care for creation as one of the three (3) legs, along with reconciliation and evangelism, of the Episcopal branch of The Jesus Movement. Putting Jesus at the center means recognizing that we are in radical, transformative and reconciling relationship with all of God's creation. This is our vision and our charge, and informs everything we do.

When the Advisory Council was first convened in July 2016, we rejoiced. The Church's prioritization of the Stewardship of Creation through the development of this body is a long-awaited response to God's call to all of us. We gave thanks to see in one another evidence of the work of the Holy Spirit, blessing God's people to be a blessing to God's planet. We also wondered at our first gathering whose voices were missing from the table; those who shared our care and concern for creation, but were not

represented on the Council. Later we would wrestle with this important question of diversity and inclusion during our next in person meeting (May 2017) resulting in our awareness of the need for training on diversity, bias and anti-racism.

Even as we remained mindful of these questions, we approached our ministry with enthusiasm and joy, recognizing that the work we were called to was deeply holy and incredibly timely. As we learned along with the rest of the world that the government of the United States had decided to withdraw from the Paris Climate Accord, we hoped that the Episcopal Church would feel empowered and committed to be stewards of creation at the diocesan, congregational and regional levels. We believe that the Council's work in this effort can help to guide The Jesus Movement in preserving and protecting creation for today and future generations.

The Advisory Council organized our fourteen (14) members around three (3) mandates: two (2) assigned in the enabling legislation 2015-A030 and one (1) subsequent related task from Executive Council. Our first mandate, outlined in 2015-A030, was to begin a small grants program. A sub group began work on developing a process and standards for grants and launched the first round of applications within three (3) months of our first meeting. Three (3) grant cycles led to one hundred (100) grant applications and forty-four (44) grant allocations during the course of the one (1) year program. Clearly, based on this robust response, there is a strong desire for support of a growing network of environmental ministries flourishing within the Episcopal Church.

Equally important was our second mandate to launch Regional Consultative Groups as envisioned by the General Convention resolution. The Council realized that the provincial configurations, with differing institutional capacities, numbers of dioceses and land areas might mean that RCGs would not be launched in all regions during this Triennium. Several provincially based RCGs have been piloted in this triennium and the Advisory Council has developed a series of recommendations for future network development as noted below. In parallel, we began to explore the concept that affinity groups based on mutual areas of interest or bioregional groups might prove more effective for the future.

The council formed a small working group to manage eco-justice projects in response to an Executive Council resolution created at their June 2016 meeting. The projects created from this third mandate for the Advisory Committee were envisioned to respond to critical local issues of eco-justice. These eco-justice projects were intended to provide direct, needed institutional and visionary support for communities in the face of inequitable and damaging environmental burdens.

In the sections below, greater details are given concerning the three (3) mandates of the Council. We also offer a series of recommendations, including possible future mandates and council membership, for General Convention to consider for the Advisory Council in the next triennium. We have been honored and humbled to serve God's church and God's creation these past eighteen (18) months.

SMALL GRANTS

The Advisory Council organized a small grant program to implement the portion of the vision of Resolution 2015-A030 which called for a granting body to nurture and enable stewardship of creation initiatives across The Episcopal Church:

The Advisory Council on the Stewardship of Creation shall create a structure for allocation of money to fund RCG initiatives at Parish and Diocesan levels within a year of the 78th General Convention, and serve as the granting body. . .

A total of $334,419 was disbursed for this work. A program of communication, application collection, approval and follow-up was developed by the committee and executed in the last quarter of 2016 through 2017.

The Advisory Council recognized the importance of empowering the local work of creation care and stewardship in parishes and other Episcopal organizations which could serve not only as local activity of eco-justice and reconciliation, but could also serve as models and resources for similar work across the larger church. Thus, the method and criterion for granting these funds took the following shape:

1. Grants were capped at $10,000 per application to insure a broad opportunity for a significant number of projects and proposals.

2. Grants were offered in three (3) separate rounds of application, review and approval within the triennium. Each round was coordinated with the tri-annual meetings of Executive Council, which was the grant approving body. There were no limits on the number of approved grants for each round. Each application was considered in each round, until the total funds were exhausted. Applicants were allowed to submit additional proposals or resubmit revised proposals in multiple rounds.

3. Grant proposals were required to be sponsored by a recognized Episcopal organization, which would receive the grant funds. Such entities could be parishes, a diocese or other Episcopal organizations.

4. Criteria for consideration of proposals included the following:

   a) Find and establish connections between eco- and social justice.

   b) Engage the local community as partners and participants, fostering cooperation between communities of faith, civic, scientific and educational organizations.

   c) Have specific outcomes which create lasting impact.

   d) Enhance faith formation and social understanding.

e) Serve groups and/or regions that are vulnerable and/or underrepresented in the church.

f) Encourage intergenerational engagement.

g) Demonstrate innovation and creativity.

h) Promote church wide learning, understanding and practical application.

The grant funds were exhausted within one (1) year which included three (3) rounds of applications and approvals.

Round 1 yielded 20 applications of which 8 were approved and $69,400 granted.
Round 2 yielded 39 applications of which 16 were approved and $123,910 granted.
Round 3 yielded 41 applications of which 20 were approved and $141,109 granted.

There were a total of one hundred (100) total applications of which forty-four (44) were approved and $334,419 granted. Projects which were proposed but not funded in earlier rounds were welcomed for resubmission with changes in subsequent rounds.

The Advisory Council was pleased with the variety of projects initiated and that the work being accomplished was not only practical, but also educational, spiritual and reconciling work which can serve as models for other faith communities to follow. The committee worked to encourage applicants to include within their proposed work support for discipleship, faith formation, fellowship and proclamation.

A sample of approved projects includes:

Kairos Earth/ Church in the Woods River of Life Pilgrimage Project connecting Episcopalians in multiple dioceses in New England with spiritual practices valuing water.
Honoré Mill and Farm, Altar to Farm Program planting wheat for communion bread, providing education on sustainable agriculture and carbon sequestration.
Diocese of Colombia, Bogota's pollution alleviation project building community partitions of native plants of South America.
Episcopal Church Diocese of Haiti/Centre, the development and use of a drip irrigation system for agriculture and a related educational program.
Trinity Episcopal Church, Bloomington Indiana. A solar installation project with faith formation, parish celebration and youth training and involvement.
The Episcopal Diocese of Arkansas. A Lower Arkansas-Maumelle River watershed permaculture and education project involving Arkansas Baptist College (an HBCU), members of Episcopal congregations and a group of young adults.

The Episcopal Diocese of Delaware. To support the diocese in continuing their project of bringing all diocesan property into compliance with the Genesis Covenant.

Recommendations

The Advisory Council believes that providing small grants to encourage and enable this kind of work is both an important and effective use of church funds. The Council makes the following recommendations:

1. Allow a wide window of opportunity for proposals to be developed, organized, submitted and resubmitted. This supports experimentation, creativity, discovery and refinement; and greatly improves the quality of proposals and projects.

2. Set criteria that requires projects to include elements of faith formation, gospel proclamation, community engagement and social reconciliation. This helps Christians to find their voice of faith, churches to understand their role as faith communities and society to hear a gospel of reconciliation of all creation.

3. Encourage projects to create artifacts which can serve the wider church, such as handbooks, curriculum, worship resources and other tools which allow others to extend and expand on the work.

4. Establish an Officer for the Stewardship of Creation role to serve as a resource person for this work (and other work of this committee), a liaison between parishes and Episcopal institutions with their many creation care initiatives, contact person for the denomination, partners and parishes, ambassador between evangelism, racial justice and stewardship of creation, and advocate for funding, visibility and action.

REGIONAL CONSULTATIVE GROUPS

Resolution 2015-A030 directed the council to provide parishes, individuals and organizations within the Episcopal Church with expertise, networks, and general support to further their environmental work and ministry through Regional Consultative Groups [RCGs]. RCGs were to be formed through the Advisory Council, which includes representation from all provinces. The RCGs were envisioned to be comprised mainly of technical experts and persons who would provide expert advice in issues of sustainability and parish support.

The council's effort to develop the RCGs began with a strategy to reach out to Provincial officers, bishops and diocesan staff to identify possible RCG members in each Province. Work was also done to identify individuals known to be engaged in eco-ministry within the various Provinces. However, it was quickly recognized how uneven and disparate this organizing work across each province would become. In some instances, there were multiple council members for a particular province that were

able to share duties. In most cases, however, there was only one Advisory Council member responsible for launching the RCG and developing a provincially based network effort while also supporting the work for either small grants or eco-justice sites. Also, some provinces were themselves highly organized while others were not as organized. Importantly, some provinces were geographically compact while others were extensively spread out.

Despite these challenges, progress was made in organizing RCGs in several provinces:

Province I. An RCG was formed based on the recommendations of the bishops of the Province, with conversation with the Executive Director of the Province. One (1) or two (2) representatives from each of the seven (7) dioceses appointed. Twelve (12) people are currently on the Province 1 RCG. The first meeting of the Province 1 RCG was held in May 2017 for introductions, goal setting and planning. There will be an in-person meeting in the first quarter of 2018 to continue the work of the RCG.

Province IV: An invitation to nominate a member to the RCG was sent to each bishop and diocese in the Province. Seven (7) nominations were received from those invitations and an initial RCG was formed. An organizing video conference was held and an in-person retreat was hosted at the Dubose Center in Sewanee. Goals and purpose were established and clarified, and additional RCG members were identified.

Province V: An invitation to nominate a member to the RCG was sent to each bishop and diocese in the Province. Information about the opportunity to serve also appeared in the Provincial newsletter. An initial RCG comprised of thirteen (13) individuals from ten (10) of the fourteen (14) dioceses in the province was formed through a combination of volunteers and nominees. The group held two (2) videoconferences, established a purpose of developing a baseline directory of current projects for care of creation within the province, and began that work.

Province VII: Province VII has started initial conversations with an already extant provincial environmental group. The group has not yet met, but has communicated and leadership is discerning how to move into the RCG role.

Province VIII: An invitation to nominate members to the RCG was sent to each bishop and diocese in the Province by the President of Province VIII. Diocesan bishops were also encouraged to publicize the RCG formation through newsletters and other means. Although several members have been identified, the RCG for Province VIII is still in the process of being formed at this time. We expect that the full group will be formed in early 2018 with initial meetings to be held through videoconferences.

Recommendations

Based on shared experiences, stories, and lessons learned, the Advisory Council recommends a new vision for the RCGs moving forward that we believe has great potential for strengthening the Church's ongoing environmental witness.

Many church members focusing on creation care ministries have experienced isolation and a need for support in the past, longing for deeper and more lasting connections to others working in these areas as a corrective to these concerns. Thus, the Advisory Council has discerned an overarching need to create and foster a church-wide flexible network to inspire and support all people doing the church's work for environmental stewardship and ecological justice. The network is initially being organized through the provinces and it will generally consist of people with a passion for environmental stewardship and ecological justice work who are willing to share their experiences and stories with others.

The broader intention and goal is to help all church members share ideas and make meaningful connections across the church. Through the appropriate collection and organization of data, network users will be able to sort inquiries for assistance by provinces, dioceses, ecoregions, bioregions, countries, and states, as well as by areas of substantive expertise, as circumstances and needs dictate. The results of network searches will connect people with a love for creation care, ecological justice, and environmental stewardship with stories to tell, experiences to share, and expertise to build from.

Further, in addition to providing access to religious and scientific expertise, the groups will serve to cultivate and support a genuinely evangelical approach to stewardship of creation. RCG leaders will develop networks of environmental ministers, clergy and lay, throughout the region or province. They will maintain regular communication with members of this network, leading them in theological reflection and facilitating mutually supportive relationships. We have felt that the Church has been asked to serve a particular purpose in this work. Instead of offering purely scientific or logistical support, we must offer spiritual perspective and offer help to existing work or interested parties by helping to cultivate relationships that will provide insight, storytelling, lessons, and support that is grounded in prayer, Scripture and our Baptismal Covenant.

We anticipate that, in this work, leaders will make use of current best practices in missional engagement, such as individual meetings, appreciative inquiry, personal and public narratives; and the Council intends to provide training for these practices. In this way, the groups will provide needed connection and support for those engaged in this work and will model an approach to stewardship of creation that is grounded in the Gospel and developed in intentional relationships.

ECO-JUSTICE SITES

Eco-Justice is justice for all, seen through the lens of human-induced climate change and environmental degradation. Eco-Justice work addresses and encompasses the whole family of God and not only the human family. Because Eco-Justice is justice for all, complex relationships contain competing goals that involve tensions and conflicts. Work in Eco-Justice then means that a straightforward, linear problem-solving approach is not likely to succeed.

The Advisory Council on the Stewardship of Creation, at the direction of the Executive Council of the Episcopal Church, devoted an important section of its work to three (3) eco-justice sites: Arctic Village in Alaska, coastal areas of Louisiana, and the Dominican Republic. Each site had an Advisory Council liaison. The protocol for our work was to look to the bishops and dioceses to define and shape the specific programs that emerge.

Eco-justice sites are places where intense environmental degradation or violent expressions of climate change have been experienced. An example of the former is the potential harm caused by the placement of the Dakota Access Pipeline under the main water source for the Standing Rock Tribe of the Lakota People. The rising sea levels already engulfing Pacific island villages is a stark and present example of the latter. Because the conditions leading to an experience of eco-injustice may have been hundreds of years in the making (climate change), because the effects of climate change are systemic and complex, and because the scale of devastation may be immense, bringing eco-justice is often a matter of long commitment. A good start has been made in the three (3) eco-justice sites with which the Advisory Council worked in this triennium, but the work has just begun. But an eighteen (18) month period was not enough time to initiate, develop and execute diocesan-wide projects of this kind. We urge continued commitment to these sites and the expansion of the Advisory Council's eco-justice work to other areas of need. The following sections describe the work in each site thus far.

Alaska
Arctic Village is in the far north of Alaska, tucked into a land embayment of the Arctic National Wildlife Refuge (ANWR). The Gwich'in People who live in Arctic Village are largely Episcopalian, and have lived for many hundreds of years in an intimate relationship of life with the immense Porcupine caribou herd (some 200, 000 in number). The Porcupine caribou herd calves in the narrow coastal zone of the Arctic National Wildlife Refuge, a range of land that the Gwich'in hold so sacred that they do not enter the area.

The coastal zone of ANWR is also of great interest for oil exploration and drilling. The consensus of wildlife biologists is that drilling would be disastrous for the caribou herd, vulnerable in the calving season. Drilling would hurt both the Gwich'in and the Porcupine Caribou herd.

The Gwich'in have tribal neighbors in the area of ANWR, the Inupiaq People. Unlike the Gwich'in, the Inupiaq have over time adopted a fossil-fuel based economy, and the expansion of drilling and more oil-related jobs is welcomed by them.

The project proposed by Bishop Mark Lattime of Alaska is to create a process that will bring the Gwich'in and the Inupiaq into meaningful, productive dialog about their mutual futures. Thus far the Advisory Council liaison has worked with Bishop Lattime to define the project and to identify an extensive list of conflict resolution resources for exploration.

Dominican Republic

In collaboration with the Iglesia Episcopal Dominicana and GreenFaith, the Advisory Council is supporting an environmental education and sustainable agriculture project in the Dominican Republic. The Diocese and GreenFaith are planning a community organizing and education workshop in early 2018 to train local leaders who will then facilitate environmental education initiatives in the twenty (28) diocesan schools. GreenFaith will provide ongoing support for these leaders. Additionally, the project incorporates a three thousand (3,000) square meter exhibition greenhouse at the Diocesan camp at Jarabacoa. The greenhouse will be a resource for environmental education and a potential model for other locations.

Accordingly, given the significant work already being done through this relationship, the Advisory Council recommends the continued financial and personnel support for the work in the Dominican Republic. This funding will support the construction of additional greenhouses in other locations, ongoing support for environmental educators, and the creation of a diocese-wide recycling initiative.

Louisiana

The Diocese of Louisiana was identified as one of our eco-justice sites by the Office of Governmental Relations last year. As a community on the Gulf Coast, New Orleans and the surrounding areas within the Diocese have experienced both traumatic events and long term devastation of ecosystems and living conditions due to climate change. The ever-worsening hurricane seasons, several "century" floods in the past few years, disappearance of the wetlands that protect the land, and species loss are just a few of the examples of what the people of Louisiana have faced and the repercussions of which they are facing today. It is long overdue to stop calling these events natural disasters and to include them in our discussions as symptoms of human-induced global warming and climate destruction. Those most affected by climate destruction in Louisiana, as in most places, are the marginalized communities. This is a call not only for organizing, but for justice work.

The Advisory Council believes that while the Diocese of Louisiana presents a unique situation in its struggle with climate change; our work with them may offer a template for other dioceses to use in building climate resilience in their own contexts. Like many other dioceses across the Episcopal Church, Louisiana acknowledges the need to address both the symptoms and the causes of climate

change in their communities, but they know neither how nor where to begin. We believe that with the support of leadership and the resources allocated as an eco-justice site, we will work with Louisiana to make it a model experience for other dioceses interested in eco-justice work.

Our liaison from the Advisory Council to Louisiana has been working with Bishop Morris Thompson of Louisiana to formulate a course of action appropriate for establishing this work in his region. There are forty-eight (48) parishes in the Diocese of Louisiana. We have identified several local organizations and educational institutions that have been working in New Orleans and the surrounding communities for years and that have researched effective techniques on building climate resilience and changing habits to reduce our contributions to climate change. We are coordinating an initial meeting in New Orleans with parish leadership and these organizations to begin the conversation around mobilizing existing resources and empowering Episcopal leaders to be on the forefront of this important ministry.

Recommendations

The Council recommends that the work begun at these three (3) sites continue into the next Triennium as the work of justice is never done in a short time frame but requires long term commitment, vision and patience to unfold into God's plan. Additionally, it is recommended that the Advisory Council in the next three (3) years develop a request for proposal process and solicit additional areas for eco-justice work around the Church.

Proposed Resolutions

The Advisory Council prepared and submitted fourteen (14) resolutions springing from our work and process.

RESOLUTION A008: CONTINUING THE ADVISORY COUNCIL ON THE STEWARDSHIP OF CREATION
Resolved, the House of _____ concurring, That because the work of the church for the stewardship of Creation is integral to discipleship in Christ, the 79th General Convention authorize an Advisory Council on the Stewardship of Creation to continue to develop this aspect of the ongoing mission and ministry of The Episcopal Church. The Advisory Council shall continue and refine the small grants program begun by the 2015-2018 Advisory Council to support local and regional eco-ministry efforts; engage eco-justice site projects, and develop creation care networks based on geographic boundaries and areas of affinity (previously known as Regional Consultative Groups); and be it further

Resolved that the Council shall receive and help disseminate, through the networks, reports from congregations, dioceses and regions on fossil fuel divestment efforts and progress reports toward keeping the spirit of the Paris Climate Accord; and be it further

Resolved, That this Advisory Council shall also establish a Theology of Creation Working Group comprised of faculty, staff and students from among the Episcopal Church's seminaries and tasked with facilitating innovative educational offerings in environmental ethics and theology for both seminarians and the broader public; and be it further

Resolved, That this Advisory Council be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with fourteen (14) to fifteen (15) members to include a diverse representation from the Church mindful to include younger generations, people of color and native persons who are and will be disproportionately affected by climate change; and be it further

Resolved, that this Council submit a report to the 80th General Convention; and be it further

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget and Finance allocate $1.1 million for the implementation of this resolution and staff support and leadership from The Episcopal Church Office.

RESOLUTION A009: CREATING GREENING LOANS

Resolved, the House of _____ concurring, That the 79th General Convention affirm the vital witness of the Church to the effects of human-caused climate change as part of our witness as modern Christians and our concern for all who come after us, as we enact our Baptismal Covenant to "persevere in resisting evil" and "strive for justice and peace among all people." And that the energy-inefficiency of our houses of worship undermine our ability to provide this witness; and be it further

Resolved, That the 79th General Convention recognize that the energy inefficiency of aging physical plants and the financial realities of parish budgets make it difficult for parishes to afford energy audits and to update their buildings to renewable and efficiency; and be it further

Resolved, That the 79th General Convention direct the Presiding Bishop's office, with the input of the Episcopal Church Building Fund, to establish a mechanism to support the greening of Episcopal churches through low-interest loans or grants and that $500,000 be allocated to meet these goals in the 2019-2021 triennium. And that the Presiding Bishop's Office present a status report to the 80th General Convention.

RESOLUTION A010: TREE PLANTING OF "PARIS GROVES"

Resolved, the House of _____ concurring, That the 79th General Convention affirm the importance of Episcopal Schools, Camps and Conference Centers in educating generations of Episcopalians, especially in matters of stewardship and relationship with Creation; and be it further

Resolved, That the General Convention, recognizing the timely importance of these conversations, commend all Episcopal Schools, Camps and Conference Centers in making environmental stewardship and care of creation key components of formation in the 2019-2021 triennium; and be it further

Resolved, That the General Convention, as part of The Episcopal Church's response to the opportunity to stand with civil society partners to keep the United States commitment to the Paris Climate Accord, commend each of the eighty-five (85) camp and conference centers in the Episcopal Church will establish "Paris Groves," plantings of trees in the camp and conference centers that will serve as a visible witness to the significance of the Paris Accord and do the practical work of sequestration of carbon from the atmosphere; and be it further

Resolved, that each camp and conference center determine the tree species appropriate for their ecosystem and plant those species; and be it further

Resolved, that each Episcopalian be encouraged to donate to one of our eighty-five (85) camp and conference centers for the establishment of Paris Groves; and be it further

Resolved, that Episcopalians gather at Episcopal Camp and Conference centers for the tree planting, establishing Paris Groves; and be it further

Resolved, that the General Convention invite each Confirmand, person received into the Episcopal Church and each person reaffirming his or her Baptismal vows to plant a tree in gratitude in an Episcopal camp and conference center Paris Grove; and be it further

Resolved, that Episcopalians be encouraged to donate to an Episcopal camp and conference center for the maintenance of an existing forest.

RESOLUTION A011: OPPOSE ENVIRONMENTAL RACISM

Resolved, the House of _____ concurring, That the 79th General Convention affirm that fossil fuel-based power plants are the single largest source of carbon dioxide pollution in the United States and major contributors to climate change; these emissions not only threaten the environmental stability of our planet, but also the health of young children and their families, disproportionately affecting the poorest among us; and be it further

Resolved, That the Church recommit to and direct the Office of Government Relations and the Episcopal Public Policy Network to oppose Environmental Racism expressed in such ways as the locating of extraction, production, and disposal industries where they disproportionately harm neighborhoods inhabited by people of color and low income communities. And to oppose coal, gas, oil, and uranium extraction and its subsequent transportation which threaten the health and sanctity

of communities and the livelihood of future generations; especially as such industries are located disproportionately nearby low income communities and neighborhoods inhabited by people of color.

RESOLUTION A012: ON THE IMPORTANCE OF ECUMENICAL AND INTERFAITH RELATIONSHIPS FOR THE STEWARDSHIP OF CREATION

Resolved, the House of _____ concurring, That the 79th General Convention commend the importance of ecumenism in addressing issues of climate change and environmental racism; and be it further

Resolved, That the General Convention acknowledge and commend the work of the diverse ecumenical and interfaith groups seeking to steward Creation; and be it further

Resolved, that as disciples of Jesus Christ, through whom all things were made and in whom all things cohere, commends our communion partners to recognize our unique opportunity to speak and act on behalf of God's Creation together; and be it further

Resolved, that the Office of Ecumenical Relations shall include the Stewardship of Creation as a priority item for dialogue and action in the Church's ecumenical relationships; and be it further

Resolved, that The Episcopal Church, seek to continue our robust heritage of interfaith partnership as an essential aspect of our gospel witness; and be it further

Resolved, That the Church commend provinces, Regional Consultative Groups, dioceses, individual parishes, clergy and lay people to steward creation as neighbors and partners with ecumenical and interfaith organizations.

RESOLUTION A013: FACILITATING THE DEVELOPMENT OF THE CHURCH'S MINISTRY OF THE CARE OF CREATION

Resolved, the House of _____ concurring, That the 79th General Convention affirm the Presiding Officers' call to the Church to recognize Care of Creation as an integral part of The Jesus Movement; and be it further

Resolved, that the General Convention establish the role of Officer for the Stewardship of Creation as a member of the Presiding Bishop's staff to directly support the work of The Episcopal Church in issues of Environmental Stewardship and Care of Creation; and be it further

Resolved, that this role shall be responsible to serve as a resource person for the Church, a liaison between parishes and Episcopal institutions with their many creation care initiatives, network developer for sharing best practices, contact person for the denomination, partners and parishes, ambassador between evangelism, racial justice and stewardship of creation, and advocate for funding, visibility and action; and be it further

Resolved, that the General Convention allocates $390,000 for the cost of this position for the 2019-2021 triennium.

RESOLUTION A014: THE USE OF CARBON OFFSETS

Resolved, the House of _____ concurring, That the 79th General Convention recognizes the reality of human-caused climate change through continued reliance on fossil fuel-based transportation; and be it further

Resolved, that, by offsetting the impact of the travel done on behalf of The Jesus Movement, the Church witnesses to its care for God's creation; and be it further

Resolved, That the General Convention direct the Presiding Bishop's Office to draft a policy in 2018 requiring the use of Carbon Offsets by the Episcopal Church Center and that such a program be tested and piloted during the triennium for the work of The Episcopal Church including the travel of its staff, standing commissions and interim bodies; and be it further

Resolved, that a plan for a broader offset program for all church travel be presented for consideration at the 80th General Convention; and be it further

Resolved, that $25,000 be allocated for the pilot carbon offset program.

RESOLUTION A015: ANTI-RACISM/DIVERSITY/BIAS AWARENESS TRAINING FOR INTERIM BODIES

Resolved, the House of _____ concurring, That the 79th General Convention affirm that the "mission of the Church is to restore all people to unity with God and each other in Christ" (BCP 855, Catechism). And that the work of The Jesus Movement is articulated in the pursuit of the reconciliation of humanity in the pursuit of Racial Reconciliation; and be it further

Resolved, that the General Convention acknowledge the work of the Church happening in Interim Bodies is done by groups of Episcopal neighbors, initially strangers to one another, under time and budget constraints and that, as Interim Bodies work, opportunities abound for conscious and unconscious bias to manifest itself and can take the form of oppression and aggression counter to the work of the Body and the Gospel; and be it further

Resolved, that the 79th General Convention require the constituted Interim Bodies of the 2019-2021 triennium to undergo Anti-Racism/Diversity/Bias Awareness Training at their initial meetings and that the cost of such trainings be folded into the budget for each Interim Body.

RESOLUTION A016: TRIAL USE OF CREATION CARE LANGUAGE IN THE BAPTISMAL COVENANT

Resolved, the House of _____ concurring, That the 79th General Convention, hearing the baptismal prayer asking for the newly baptized to be granted "the gift of joy and wonder in all your works," authorize the trial use of additions to the Baptismal Covenant concerning our responsibility as baptized Christians to care for God's creation; and be it further

Resolved, that there be two (2) options for this addition;

>First, an additional question may be added with the wording:
>"Will you cherish the wondrous works of God, and protect and restore the beauty and integrity of all creation?
>People: I will, with God's help."

>Second, that the question:
>"Will you strive for justice and peace among all people, and respect the dignity every human being?" may be augmented as "Will you strive for justice and peace among all people, and respect the dignity of the Earth and every human being?" and be it further

Resolved, that use of this additional wording be authorized for trial use as part of the Baptismal Covenant for the triennium following the 79th General Convention, beginning on the first Sunday of Advent 2018; and be it further

Resolved, that the Standing Commission on Liturgy and Music accept comments and suggestions on the trial baptismal covenant language at the 80th General Convention and, as appropriate, consider for future inclusion in the revised Prayer Book.

RESOLUTION A017: CREATION LITURGIES IN PRAYER BOOK REVISION

Resolved, the House of _____ concurring, That the 79th General Convention affirm the central Anglican tenet of *lex orandi, lex credendi* ("the law of praying is the law of believing," or, more conversationally, "praying shapes believing"); and be it further

Resolved, that the Prayer Book is a primary way Episcopalians are formed through *lex orandi, lex credendi*; and be it further

Resolved, that, in light of the catastrophic failure of humanity to live into its role as stewards of God's good creation and our inherent call to reconcile with all God's creation, the General Convention directs future Prayer Book revision to include creation-focused liturgies which recognize mourning and lamentation, joy and celebration, and repentance and reconciliation; and be it further

Resolved that this understanding, appreciation and care of God's good creation be explicitly incorporated in the Baptism, Eucharist, Confirmation and Ordination liturgies.

RESOLUTION A018: EPISCOPALIANS PARTICIPATING IN THE PARIS CLIMATE AGREEMENT

Resolved, the House of _____ concurring, That the 79th General Convention recognize that there is an important shift toward renewable energy which will help protect God's good creation. Supporting this shift is part of the Church's call to being part of The Jesus Movement in the world and; and be it further

Resolved, That climate change be recognized as a human-made threat to all God's people, creatures and the entire created order, while particularly placing unjust and inequitable burdens and stresses on native peoples, poor communities and people of color; and be it further

Resolved, That the 79th General Convention, to further advance the House of Bishop's 2011 Pastoral Teaching on the Environment commitment to "advocate for a fair, ambitious, and binding climate treaty," make every effort to fully and completely participate in future meetings of the United Nations Conference of Parties on Climate Change as an active, faithful and engaged voice for all of God's good earth; and be it further

Resolved, that as individuals and communities of faith, the Episcopal Church set an example, in the spirit of the Paris Climate Accord, by making intentional decisions about living lightly and gently on God's good earth, for example, through energy conservation, renewable energy, sustainable food practices, gardening, sustainable coffee hours in parishes (considering the carbon footprint, resourcing, health consequences, and waste streams of materials, locations) and be it further

Resolved, that dioceses, parishes and individuals making commitment to the Paris Climate Accord consider reporting on their commitments, actions and successes to the Advisory Council on the Stewardship of Creation.

RESOLUTION A019: CREATE A TASK FORCE TO STUDY AND REPORT ON THE INTERSECTION OF EVANGELISM, CHURCH PLANTING, AND CARE OF CREATION

Resolved, the House of _____ concurring, that the 79th General Convention directs the Presiding Bishop and the President of the House of Deputies to appoint a Task Force to study and report on the intersection of Evangelism, Church Planting, and Care of Creation; and be it further

Resolved, that the Task Force shall be made up of no fewer than six (6) and no more than twelve (12) individuals and shall include representation from mission enterprise zone developers, church planters, local evangelists and creation care advocates, Executive Council members, and members of the Presiding Bishop's Staff; and be it further

Resolved, that the Task Force shall determine how many of the new ministries begun with funding from The Episcopal Church since two thousand (2000) integrate the care of Creation as a core component of ministry. The Task Force shall interview these ministry founders and core team, and shall make an assessment regarding the opportunities, challenges, and blessings of this intersection of ministry. In particular, the Task Force shall make an assessment as to whether and how these methods of ministry are effective in engaging younger generations, defined as individuals and households under forty (40) years of age; and be it further

Resolved, that the General Convention allocate $100,000 for this work in the current triennium.

RESOLUTION A020: FOSSIL FUEL DIVESTMENT

Resolved, the House of _____ concurring, That the 79th General Convention call upon the Investment Committee of the Executive Council, the Episcopal Church Endowment Fund, and the Episcopal Church Foundation to report to Executive Council all steps taken in the past triennium to divest from fossil fuel companies and reinvest in clean renewable energy in a fiscally responsible manner in accordance with General Convention resolution #2015-C045; and be it further

Resolved, That the General Convention reaffirm the language of resolution #2015-C045 urging all dioceses and parishes of the Episcopal Church to engage the topic of divestment from fossil fuels and reinvestment in clean energy and encourage dioceses and parishes to share progress toward this goal with the Advisory Council on the Stewardship of Creation; and be it further

Resolved, That the General Convention commend the Church Pension Fund for its passion in responding to climate change and for its statement "This does not mean that we would never divest; to do so, however, we would have to believe that divesting would not negatively impact the financial performance of our portfolio." (CPF Report to the House of Deputies, November 2, 2017, page 6) and be it further

Resolved, in light of this statement, that the General Convention urge CPF to consider that its fiduciary duty to shareholders may require it to avoid climate change-related risk, including investment in fossil fuel companies, and therefore to initiate a thorough investigation of the potential financial impact, both benefits and disadvantages, of divestment from fossil fuel companies and reinvestment in clean renewable energy, to take steps to effect such divestment/reinvestment in a fiscally responsible manner, and to report back CPF's findings to the 80th General Convention.

RESOLUTION A021: CANONICAL CHANGE: INTEGRATE THE CARE OF CREATION INTO THEOLOGICAL EDUCATION FOR ORDINATION

Resolved, the House of _____ concurring, That the 79th General Convention recognize the critical importance of ordained leadership in prophesying change in communities and nations, especially in ethical issues; and be it further

Resolved, That the 79th General Convention proclaim that the degradation and destruction of God's Creation by human beings is among the most pressing ethical issues of our time and a perversion of our original commandment to "have dominion over the fish of the sea and over the birds of the air and over every living thing that moves upon the earth" (Genesis 1.28); and be it further

Resolved, That the 79th General Convention acknowledge the lack of training most clergy have in Christian Environmental Ethics and Stewardship of Creation; and be it further

Resolved, That Canon III.3.8.5(g)(4) is hereby amended to read as follows:
Sec. 5 (g)(4) Christian Ethics and Moral Theology., *including environmental ethics and theology*
And be it further

Resolved, That Canon III.3.8.5 (g)(6) is hereby amended to read as follows:
Sec. 5 (g)(6) The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, *environmental stewardship and care of creation,* and the historical and contemporary experience of racial and minority groups.

ADVISORY GROUP FOR CHURCH PLANTING

Membership

The Rev. Jane Gerdsen, *Chair*	Southern Ohio, V	2018
The Rev. Valerie Bailey Fischer	Newark, NJ, II	2018
The Rt. Rev. Mary Gray-Reeves	El Camino Real, VIII	2018
The Rev. David W. Perkins	Georgia, IV	2018
Ms. Erendira Jimenez-Pike	Kentucky, IV	2018
The Rev. Alex Montes Vela	Texas, VII	2018
The Rev. Katie Nakamura Rengers	Alabama, IV	2018
Mr. Zachary Charles Nyein	East Tennessee, IV	2018
The Rev. Canon Jesus Reyes	El Camino Real, VIII	2018
The Rev. Canon Janet Waggoner	Fort Worth, TX, VII	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018
The Rev. Canon Frank Logue, *Liaison to Executive Council*	Georgia, IV	2018
The Rev. Canon Tanya Wallace, *Liaison to Executive Council*	Western Massachusetts, I	2018

CHANGES IN MEMBERSHIP

Members, resigned:

The Right Rev. George Sumner

The Rev. Mike Michie

Additional members appointed during the triennium:

The Right Rev. Mary Gray Reeves

The Rev. Mike Michie, *Staff*

Mandate

Resolution D005 created this Advisory Group to expand the work of the Office of Church Planting and Redevelopment, in partnership with and under the guidance of the Joint Standing Committee on Local Mission and Ministry.

The ministry of this Advisory Group, as directed by Resolution D005, has been to create a church-wide network for planting churches. As per the Resolution, the work of the Advisory Group was to included:

- Identifying and supporting existing programs for training in planting congregations for clergy and lay leaders;
- Providing resources for planters of congregations;
- Developing and implementing a program to train bilingual/bicultural lay and ordained leaders for Latino/Hispanic ministries;
- Hiring a staff person to oversee the planting network
- Distributing approximately $3,000,000 in grant funds to new church starts and mission enterprise zones.

The Advisory Group was to develop criteria for receiving grants, provide a reporting process, make recommendations to Executive Council about grants to be awarded, identify and assess potential planters, and develop a network of assessors and coaches, as well as initiate training processes to support new church starts and mission enterprise zones. The Advisory Group was guided by the Resolution to work with the Communications Office of The Episcopal Church to establish a website and Facebook page for church planting initiatives, as well as to produce news stories and videos to celebrate the work of church planting in The Episcopal Church.

The Advisory Group on Church Planting was also asked to oversee the continued funding of Mission Enterprise Zones [MEZ] as outlined in **Resolution A012** and to collaborate with Hispanic and Latino Ministry developers working on **Resolution A086.**

Summary of work

Link to video: https://www.episcopalchurch.org/mission-developers-report-church

The Episcopal Church launched a new missional movement to engage in evangelism and church planting initiatives and to cultivate new ministries for The Jesus Movement. As there has not been a culture of church planting in the Episcopal Church in recent years, the appointment of the Advisory Group on Church Planting has helped steward the development of a church wide network for planting congregations, training and recruiting planters and mission developers and establishing new congregations and missional initiatives. Over the course of this triennium, the Advisory Group on Church Planting received over one hundred and twenty (120) grants and recommended funding for sixty-six (66) new ministries with $3,400,000 allocated for funding new church plants and mission enterprise zones. This includes

- Twenty-one (21) new church starts
- Twenty-two (22) new mission enterprise zones and hybrid missional communities
- Fourteen (14) discernment grants to assist with assessment, training, and consulting during the pre-launch phase of a project

- Ten (10) renewal grants for ministries initially funded in 2013-2015

- The new starts include: eight (8) Latinx new starts, three (3) other multi-ethnic new starts, and two (2) specifically connecting with millennials. Some examples include Christ's Beloved Community (NC), Hope Sandwiches (CA), Misa Magdalena (DC), Sudanese Congregation at St. Paul's (Central NY), Epiphany Church (GA).

- The MEZ's include: three (3) Latinx, although almost all deal with non-dominant population groups including millennials, those living with poverty or homelessness, indigenous/native groups, or environmental stewardship/farming. Some examples include Plainsong Farm (MI), Franklinton Cycleworks (S. OH), Supper@St. Martins (PA), Table 229 (MN), Four Saints Food Pantry (Ft. Worth, TX), Between the Ridges (WA), Proyecto para una panaderia y pasteleria (Ecuador),

- The renewal grants include: four (4) Latinx renewals, two (2) other multi-ethnic, one (1) working with millennials, and one (1) farming. Examples include: The Abbey (AL), St. Gabriel's (VA), Our Lady of Guadalupe (Olympia), San Pedro y San Paul (OR), the Abundant Table (CA), and Warriors for a Dream (NY).

Each of these ministries is in a different phase of development, some are still organizing, some are pre-launch, some are just now launching, and many of these communities are thriving, growing in membership and involvement. Each ministry is reporting back their progress in the form of a dynamic ministry plan platform that allows mission developers to keep their diocesan advocates, coaches, and church center staff up to date on their plans and growth. To learn more about individual churches or missional initiatives visit: https://www.episcopalchurch.org/church-planting-and-missional-development. You can find more statistics, a map of funded ministries, videos, stories, reflections and resources.

The work of the Advisory Group on Church Planting proceeded throughout the Triennium on two (2) intersecting tracks. The first of these tracks was the creation – through research, design, partnership, execution and evaluation – of an infrastructure for mission development. The second track was the distribution of $3,400,000 in grant funds to selected church plants and mission enterprise zones, a process which included designing an application, supporting church planters in the clarification of their goals and in the completion of their applications (including encouraging deeper partnerships with their dioceses), receiving and evaluating applications, continuing conversations with church planters about their applications, awarding grants, and establishing and maintaining a process for follow-up with these church plants and distribution of grant funds.

The Advisory Group met as a group of the whole three (3) times during the Triennium – in February 2016 in Maryland, in August 2017 in Cincinnati, and in October 2017 in Baltimore. In addition, the Advisory Group met monthly by video conference throughout the Triennium. Further, subcommittees met regularly as needed for their particular work, and in September 2017, Tom Brackett and Jane

Gerdsen, chair of the Advisory Group, met with Mike Michie, Staff Officer for Church Planting Infrastructure, after he was hired in September 2017.

APPLICATION PROCESS AND GRANT AWARDS

The Advisory Group on Church Planting developed four (4) applications, each for a different kind of mission planting endeavor:

1) An application for Mission Enterprise Zones

2) An application for Church Plants

3) An application for Hybrid Ministries (a ministry, outreach program or mission enterprise zone developing into a church plant)

4) An application for a Discernment Grant

The Advisory Group also considered renewal applications for mission enterprise zones and developing church plants which had received funding in the last triennium for a mission enterprise zone or discernment grant for those working to clarify and develop a church plant.

The Advisory Group considered four (4) main factors in evaluation of grant applications:

1. The person or team: A clearly identified missioner or team was given priority. Minimally, a local team was required to have a sense of the qualifications and skills needed in a church planter. Church planters supported with grant funds were required to undergo assessment to evaluate their strengths and weaknesses as related to the particular work of church planting.

2. The place: A clear sense of the context and/or community to be served. Evidence of a significant amount of research regarding the context and the elements needed for a church plant to be successful in that context. Evidence that the skills and ministry background of the church planter/mission developer will be a good fit for that context.

3. The plan: A clear plan and strategy for the ministry, an articulated plan for growth of the ministry, development of stewardship and/or fundraising, and an understanding of the steps needed to attain sustainability of the ministry.

4. Support from the Diocese: An endorsement letter from the bishop was required. In most cases, matching funding was required, with the exception of dioceses in which financial resources are scarce. In those cases, other evidence of strong support for the project was required.

The grant applications were translated into Spanish and released in April 2016. The Advisory Group received applications throughout the triennium until funding was dispersed. June 1, 2016 was the first deadline for applications to be considered. During the course of the triennium, over one hundred and twenty (120) applications were received, and sixty-five (65) ministries were funded. A summary of ministries funded is as follows:

New Church Plants
Recipients of $100,000 grants (unless otherwise noted)

Christ's Beloved Community – Winston-Salem, NC
Diocese of North Carolina

Good Samaritan – Brownsburg, IN
Diocese of Indianapolis

Millennial Church Start – Savannah, GA
Diocese of Georgia

Southwest Florida Church Plant
Diocese of Southwest Florida

Hope Sandwiches, St. John's – Bernardino, CA
Diocese of Los Angeles

El Corazon – Grand Haven, MI
Diocese of Western Michigan

Chaplain on the Harbor – Grays Harbor, WA
Diocese of Olympia

Episcopal Church of the Resurrection – Plano, TX ($75,000)
Diocese of Dallas

La Iglesia Episcopal – Lynn, MA
Diocese of Massachusetts

Iglesia Episcopal St. James Portland, OR ($78,000)
Diocese of Oregon

Church Plant – Hermitage, PA
Diocese of Northwestern Pennsylvania

Slate Project – Baltimore, MD ($75,000)
Diocese of Maryland

Episcopal Church of Parker County – Parker County, TX
Diocese of Fort Worth

Comunidad Latina de San Dunstan – Tulsa, OK
Diocese of Oklahoma

Misa Magdalena – Aspen Hill, MD
Diocese of Washington (DC)

Sudanese Congregation at St. Paul's – Syracuse, NY ($50,000)
Diocese of Central NY

Senor de la Misericordia – Denison, IA
Diocese of Iowa

Two Cultures, One Body in Christ - Monmouth County, NJ ($60,000)
Diocese of New Jersey

North Park Project – San Diego, CA
Diocese of San Diego

Grovetown Episcopal Mission – Augusta, GA
Diocese of Georgia

Bethesda Episcopal Church – Orlando, FL
Diocese of Central Florida

Mission Enterprise Zones [MEZ]
Recipients of $20,000 grants (unless otherwise noted)

Supper @ St. Martin's – Philadelphia, PA
Diocese of Pennsylvania

St. John's Episcopal Church – Cleveland, OH ($23,000 + $31,000 after growth to planting worshipping community)
Diocese of Ohio

Table 229 – St. Paul, MN ($20,000 + $20,000 after growth to Hybrid/Church Plant)
Diocese of Minnesota

Breaking Bread – Rapid River, MI ($15,000)
Diocese of Northern Michigan

Plainsong Farm – Rockford, MI
Diocese of Western Michigan

Four Saints' Food Pantry – Fort Worth, TX
Diocese of Fort Worth

The Divine Office – Santa Monica, CA ($40,000)
Diocese of Los Angeles

St. Luke's Ministry Interns – Seattle, WA ($20,000)
Diocese of Olympia

Between the Ridges – Wapato, WA ($20,000)
Diocese of Spokane

The Center for Mission and Ministry at St. Paul's – Kansas City, KS
Diocese of Kansas

Latinos Pa'lante St. Mary's Latino Ministry –Dorchester, MA (Hybrid/MEZ) ($60,000)
Diocese of Massachusetts

Franklinton Cycleworks – Columbus, OH
Diocese of Southern Ohio

Proyecto para una panaderia y pasteleria – Guayaquil, Ecuador
Diocese of Ecuador Central

Episcopal Ministries of Corpus Christi – Corpus Christi, TX
Diocese of West Texas

Extending the Table - Steven's Point, Wisconsin (MEZ) ($20,000)
Diocese of Fond du Lac

Grace Church Red Hill – North Garden, VA (Hybrid MEZ) ($40,000)
Diocese of Virginia

Justice, Healing, Reconciliation Center – Iowa City, IA (Hybrid MEZ) ($75,000)
Diocese of Iowa

South Sudanese Congregation – Alexandria, VA
Diocese of Virginia

Church at the Crossroads – Detroit, MI ($25,000)
Diocese of Michigan

Teens of Santa Cruz County – Santa Cruz, CA
Diocese of El Camino Real

Appleton Episcopal Ministries – Macon, GA
Diocese of Atlanta

Discernment Grants
Recipients of $5,000 grants

South Bronx Team Ministry – Bronx, NY
Diocese of New York

The Bridge, St. Peter's – Dartmouth, MA
Diocese of Massachusetts

Emmaus Episcopal Church – Surprise, AZ
Diocese of Arizona

Grace Church – Montpellier, France
Convocation of the Episcopal Church in Europe

Elizabeth Easton ($2,500)
Diocese of Nebraska

Pamela Mott ($2,500)
Diocese of Western Massachusetts

Hispanic Church Plants in Garland, TX and Mount Pleasant, TX ($2,500 each)
Diocese of Dallas

Christ Church – Bayfield, WI ($3,000)
Diocese of Eau Claire

Garry Commins
Diocese of Newark

Meghan Mullarkey ($3,000)
Diocese of Olympia

Meg Wagner ($5,000)
Diocese of Iowa

Ragan Sutterfield
Diocese of Arkansas

Kairos West – Asheville, NC
Diocese of Western NC

Evangelizando con Los Lencas
Diocese of Honduras

Renewals
Amount of grant funding as noted below

The Advisory Group on Church Planting recommended to the Executive Council that approved renewals be sent (upon notice of renewed funding) a survey about learning, spiritual health, and ongoing support and needs. The Advisory Group also recommended that renewals be asked to contribute to the growing church planting community of practice, by providing – in writing and video form – more information about their ongoing learnings, in order to encourage the movement of church planting across The Episcopal Church.

Bread and Roses – Charlotte, NC ($12,500)
Diocese of North Carolina

Church on the Square – Baltimore, MD
Diocese of Maryland

The Abbey – Birmingham, AL ($75,000)
Diocese of Alabama

Our Lady of Guadalupe – Seattle, WA ($100,000)
Diocese of Olympia

St. Gabriel's – Leesburg, VA ($75,000)
Diocese of Virginia

San Pablo – Seaside, CA ($96,000)
Diocese of El Camino Real

San Pedro/San Pablo – Portland, OR ($45,000)
Diocese of Oregon

St. James – Pittsburgh, PA ($50,000)
Diocese of Pittsburgh

The Abundant Table Farm ($35,000)
Diocese of Los Angeles

Warriors of the Dream – New York, NY ($20,000)
Diocese of New York

Many of the applications for which the Advisory Group was unable to provide funding were for ministries that are still in various stages of development. It is anticipated that, if funding for church planting continues as requested in the Resolution below, some of these ministries will be ready to receive funding in the coming triennium.

In order for new ministries - church plants, mission enterprise zones and hybrids - to thrive in The Episcopal Church, two (2) additional areas need to receive particular support in the next triennium. First, potential church planters and mission developers need to be identified, assessed, and trained. There is great need for leaders gifted in church planting, particularly persons who are bilingual and/or bi-cultural. Second, deeper partnerships and resources must be developed at the diocesan level. Some dioceses have the skill, vision, and commitment to partner with new church plants, while others lack experience and training in this area. Many dioceses lack financial resources or believe that investments in new church plants are too risky. Additional encouragement, partnership, and training is needed to stir some dioceses to enthusiasm and action. The Advisory Group on Church Planting and Missional Initiatives hopes that through the work undertaken in this triennium, we might inspire and encourage

The Episcopal Church to a deeper understanding of how best to support and sustain new mission development across the church.

COMMUNICATIONS

In addition to the development of an application process, the Advisory Group worked to rebrand and develop marketing materials for the work of church planting and mission development in The Episcopal Church [TEC], calling this initiative "Genesis – Cultivating New Ministries in The Episcopal Church." In partnership with the Communications Office of The Episcopal Church, the Advisory Group developed new branding for TEC's church planting movement, as well as a website (with information also available in Spanish), blog, and Facebook account. The communications sub-committee of this Advisory Group helped write a number of press releases announcing the availability of new grant funds and the work of the Advisory Group, including assessment, training, and coaching for church planters. In addition, a series of video messages was released, lifting up these exciting opportunities for the Church and our hopes for what might emerge from this work. The website, videos and stories can be found here: https://www.episcopalchurch.org/church-planting-and-missional-development.

ASSESSMENT, COACHING, AND TRAINING

- Assessments – Research reveals that three (3) keys to a successful new ministry are (1) right mission developer – someone who has the particular abilities, commitments and skills to lead a new start; (2) right location – a context in which there is local commitment and a high rate of growth in the community; and (3) right fit – a mission developer that fits well in the community and context and who has the support of the local Episcopal community. The Advisory Group identified assessors adept in the use of the assessment tool developed by the United Methodist Church. These assessors not only assessed planters seeking grant support for their endeavors, but also trained Episcopal assessors in the use of the assessment tool, as adapted for our Episcopal context.

- Coaching – Research on methods of coaching and reports of outcomes from planters who have received coaching resulted in a decision to train and deploy church planting coaches who meet two (2) criteria: (1) experience in mission development and (2) training through a program certified by the International Coaching Federation. The Advisory Group invited applications from coaches who already have these qualifications, while also coordinating training for new coaches. Training for these new coaches is provided by contract, in exchange for seventy-five (75) hours of coaching which they provide to individual planters upon completion of their training.

- Training – Foundational to our work is the training of mission developers and their teams. The Advisory Group explored a number of training resources, including ministry development plans, online resources and in-person trainings. Because in-person training opportunities also contribute to the development of a community of practice, the Advisory Group instituted in-

person training sessions, and held three (3) of these sessions during the triennium. Following participation in training sessions, church planters and their teams are invited to a monthly on-line community of practice conversations which provide ongoing accountability for ministry plans as well as shared wisdom regarding best practices.

COMMUNITY OF PRACTICE

A Community of Practice has been created by organizing gatherings not only for grant recipients and prospective grant recipients, but also for many others who are curious about or already engaged in the work of church planting and new ministry development.

In November of 2016, a Genesis Gathering was held in Dallas, as a pre-conference event occurring before the Evangelism Matters Conference. Over fifty (50) church planters and ministry developers came together for this Gathering, where we built capacity for these ministries, shared learnings, and offered networking opportunities for persons engaged in similar kinds of ministries. In April 2017, a Genesis Gathering was held prior to the Missional Voices conference at Virginia Theological Seminary.

Our Community of Practice has continued to develop through online conversations and trainings. A variety of resources, many of which are available online, have also been made available to support the work of planters and mission developers.

STAFF OFFICER FOR CHURCH PLANTING INFRASTRUCTURE, CHURCH PLANTING AND REDEVELOPMENT

Resolution D005 specifically included funding to support a staff position to undergird the work of church planting and mission enterprise initiatives. In Spring of 2017, a committee was appointed to engage with leadership at The Episcopal Church Center in the hiring process. Following a process of extensive application review, interviews and engagement with candidates, the hiring committee selected The Rev. Mike Michie. Since 2005, Michie served as rector of St. Andrew's in McKinney, TX, a church he planted and of which he is the founding rector. Under his leadership, the congregation grew to a 650-member church, with a series of community-based ministries, including an outreach program called "The Bless-Mobile," a food truck ministry.

IN CONCLUSION

Our church is being called to new adventures in The Jesus Movement – to participate in the Holy Spirit's action in the world and to share the Good News of God's extravagant love. We have spent this triennium building a robust infrastructure for the work of church planting, including creating a dynamic community of practice. We have identified where new communities are forming around the church, and we have created spaces for leaders in the work of church planting and mission enterprise development to gather for mutual sharing and support, as well as to be equipped with spiritual, material, and relational resources for the work of the Gospel in local contexts. We know that there is work left to do, and we hope that General Convention will approve funding for this important work in the next triennium.

Proposed Resolutions

Therefore, the Advisory Group on Church Planting proposes the following Resolutions for consideration of General Convention 2018.

RESOLUTION A005: CONTINUE A CHURCH-WIDE NETWORK FOR PLANTING CHURCHES—2018

Resolved, That the 79th General Convention and the Episcopal Church celebrate and strategically support emerging communities through the good work initiated by GC2015 – D005 and A012 to develop a church-wide network for planting congregations, training and recruiting planters and mission developers; and establishing new congregations or mission enterprise zones each triennium that are especially committed to mission and evangelism that engages under-represented groups, including youth and young adults, people of color, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement; and be it further

Resolved, That the Church honors the holy experiments emerging throughout the Church – experiments that build partnerships, expand the language of ministry, create new ways to engage the people of God, harvest and share learnings, and lend courage to those leading new ministries and lower the cost of failure through a network supporting mission development; and be it further

Resolved, That the budget for sustaining this congregational network will be $6,800,000.00 for 2019-2021 to be allocated as follows:

- $200,000 to identify and support existing programs to produce training in planting congregations for clergy and lay leaders
- $600,000 to provide resources for planters of congregations
- $1,000,000 for the development and implementation of a program to train bilingual/bi-cultural lay and ordained leaders for various cultural contexts
- $500,000 to support a staff person to oversee the planting network
- $3,000,000 for grants to support up to 30 congregations with the size and grant depending on the context and need of the congregation; and be it further
- $1,500,000 for the establishing of a land bank for   purchasing land for new churches. Monies borrowed for land purchase will be repaid by the borrowers; and be it further

Resolved, That the convention urges The Episcopal Church Development Office to prioritize raising $6 million per triennium to plant new congregations, so that a network of interested donors will be developed; and be it further

Resolved, That Dioceses receiving money for planting new congregations under this program will contribute matching local funding to support the costs of any new plants, with the exception of cases of significant diocesan financial limitations; and be it further

Resolved, that the bishop or a diocesan advocate representing any diocese receiving funds shall take part in a cohort of church planting dioceses to share best practices and methods of supporting mission developers, as we all are learning how to nurture new ministries that challenge our assumptions about how to share the gospel with new cultures and generations, and that dioceses not receiving grant funds are also invited to participate in the diocesan cohort; and be it further

Resolved, the Presiding Bishop and President of the House of Deputies continue the advisory group of not more than twelve (12) people, consisting of those with experience in planting congregations, diocesan oversight of such work, working with evangelism and mission, to carry out provisions of this resolution, including making recommendations to Executive Council about grants to be awarded, helping to identify potential planters, and continuing to develop a network of coaches, and working with staff on training church planters, and be it further

Resolved, That the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of $6,800,000 for the implementation of this resolution.

Explanation:

As we have not in recent years had a culture of church planting or infrastructure in The Episcopal Church to plant new congregations, we believe it is necessary to be intentional about creating the environment to encourage new mission development and evangelism efforts across the church. The 78th General Convention established the Advisory Group for Church Planting and allocated $5,000,000.00 for establishing new churches and mission enterprise zones. That Advisory Group has recommended grants to Executive Council for the funding of sixty-five (65) new works, continuing existing works and has begun developing resources for assessing and training church planters.

During this triennium, the Advisory Group has held three (3) training events for church planters and mission developers and has begun establishing a network of coaches. This group also has hosted community of practice gatherings both in person and online, offering training and support for planters, mission developers, and coaches.

The Advisory Group for Church Planting is committed to continuing engagement in this work and for seeking out and networking with others across the church who will join in supporting these endeavors for the furthering of mission development in the Episcopal Church.

Citation: General Convention, Journal of the General Convention of….The Episcopal Church, Salt Lake City, 2015 (New York: General Convention, 2015), pp. 314-315.

Regarding Resolution, A006 Collect Demographic Data of Leadership, as we also spent significant time working to support the development of new communities of under-represented people in the Episcopal Church, the Advisory Group on Church Planting also proposes the following Resolution for consideration at General Convention 2018. We hope to encourage the church to begin to tell the truth about who is in leadership in our communities of faith and to work toward further justice and equity in leadership across the church.

RESOLUTION A006: COLLECT DEMOGRAPHIC DATA OF LEADERSHIP

Resolved, the House of _____ concurring, That the 79th General Convention adopt a standard of requiring recipients of mission enterprise zone and new church start grants to disclose how the demographics (ethnicity/age/income range) of those in positions of authority in the new ministry, including staff and any advisory board or vestry members, compare to the demographics of the surrounding population, and be it further

Resolved, That the Parochial Report be modified to collect demographic data (ethnicity/age/income range) on vestry members together with the demographics of the surrounding three (3) mile radius of the church.

Explanation:
Our work as the Advisory Group on Church Planting has revealed that instrumental to starting and maintaining healthy communities of faith and/or worshipping communities requires that the dynamics of power, privilege, and authority be consistently evaluated and reevaluated to ensure that church leadership reflects the communities they are a part of or are hoping to engage, and to expand existing concepts of leadership. Doing so allows the new ministry to grow out of healthy DNA.

Our work with church plants and mission enterprise zones is an invitation to the church to a new way of thinking, because best practices for new ministries inform how we go about existing ministries. To that end, the Advisory Group hopes to bear witness to the reality that it is best practice for all churches to be aware of how those in positions of authority reflect the existing community around the church. We believe that asking congregations to supply this information each year using the demographic report found at The Episcopal Church Researching Your Congregation and Community web page together with information on staff and vestry will raise the issue in a helpful way for all of the congregations of The Episcopal Church.

Budget

SUMMARY FINANICAL REPORT FOR THE 2015-2018 TRIENNIUM

The Advisory Group on Church Planting made recommendations to Local Ministry and Mission and Executive Council for the funding of sixty-five (65) new church plants and mission enterprise zones, totaling to date $3,203,500 at the time of this report. We anticipate giving the whole $3,400,000 by the end of the triennium.

Church Plant Grants: $1,938,000
MEZ/Hybrid Grants: $609,000
Discernment Grants: $48,000
Renewal Grants: $608,500

In addition, the Advisory Group spent budgeted funds for travel and meetings, to fund coaching and assessor trainings, mission developer trainings and community of practice gatherings throughout the triennium. $240,000 was budgeted for this work.

	Year to date	Projected End of Triennium
D005 Committee Travel/Meetings:	$23,190.53	$50,000
Coach/Assessor Trainings:	$23,945.09	$53,000
Mission Developer Training:	$49,946.07	$120,000
Community of Practice:	$6,259.48	$15,000
Total:	$103,341.17	$238,000

Continuance Recommendation

Now that an infrastructure for church planting and for development of mission enterprises has been established, it is essential to sustain and utilize this infrastructure. These resources must be matched by resources of the wider Church in order for this work to continue to grow and to thrive.

COMMITTEE TO STUDY THE RELATIONSHIP OF THE GENERAL CONVENTION AND THE GENERAL THEOLOGICAL SEMINARY

Membership

The Rt. Rev. Arthur B. Williams, Jr., *Chair*	Ohio, V	2018
The Rev. Cathy Caimano, Member	North Carolina, IV	2018
Mr. William R. Cathcart, Esq., Member	Oklahoma, VII	2018
Ms. Dianne Audrick Smith, Member	Ohio, V	2018
The Rev. M. Sylvia O. Vásquez, Member	California, VIII	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

CHANGES IN MEMBERSHIP

There were no changes in membership.

REPRESENTATIVES OF THE COMMITTEE AT GENERAL CONVENTION:

Ms. Dianne Audrick Smith

Mandate

2015-D075 Reinvigorate the Accountability of GTS to General Convention

Resolved, the House of Bishops concurring, that the Presiding Officers appoint a committee of no more than 5 members, including one of the Trustees elected at the 78th General Convention, to evaluate the relationship between the General Convention and the General Theological Seminary to determine whether this relationship is mutually beneficial at this point in the life of the Church; and be it further

Resolved, that the committee report to the 79th General Convention of The Episcopal Church with recommended action, including the possibility of ending this relationship.

Summary of Work

MEETINGS

The Committee to Study the Relationship of the General Convention and the General Theological Seminary met in New York, New York in February 2017 and in Cleveland, Ohio in August 2017. The Committee also met via video conference call eleven (11) times: June, July, September and December of 2016; and January, March, May, June, August, October, and November of 2017.

At its organizational meeting, Bp. Williams appointed William Cathcart as its Secretary. Subsequently, Bp. Williams appointed The Rev. Catherine Caimano to serve as Secretary, so that Cathcart could serve as host of the online meetings. At its initial meeting and in subsequent meetings, the committee received comments and took action as reflected in this report. For detailed accounts of the committee's proceedings, readers are referred to the minutes of the committee's meetings, available at the committee's webpage on the General Convention website.

REVIEW OF COMMITTEE'S WORK

Based on the mandate, the Committee finds that the current relationship between the General Convention and the General Theological Seminary is not mutually beneficial; however, the Committee does **not** recommend ending the relationship. The Committee recommends taking action to improve and strengthen the relationship. The Committee also recommends strengthening the relationship between the General Convention and **all** Episcopal seminaries.

BRIEF SUMMARY OF THE HISTORICAL RELATIONSHIP BETWEEN THE GENERAL CONVENTION AND THE GENERAL THEOLOGICAL SEMINARY

The General Theological Seminary was established by the General Convention of 1817. The General Convention of 1821 drafted the Constitution for the General Theological Seminary. An article of the original Constitution required that any amendment to the Constitution required approval of both General Convention and the Board of Trustees of the Seminary. The requirement for concurrent action of the General Convention and the Board of Trustees has remained unchanged.

Over the past two hundred (200) years, twenty-eight (28) General Conventions have considered resolutions relating to the General Theological Seminary. When it was formed, the General Theological Seminary was to "have the united support of the whole church in these United States, and be under the superintendence and control of the General Convention." Early resolutions included funding for General Theological Seminary until it could become self-sufficient. Funding by the General Convention has not been provided for some time, although efforts by the Committee to determine exactly when the funding ceased have been inconclusive.

Fifteen (15) General Conventions have acted on changes to the General Theological Seminary Constitution. Nine (9) General Conventions have acted upon changes in the makeup of the Board of Trustees.

The size of the Board of Trustees of the General Theological Seminary has been the subject of a number of amendments to its Constitution. When the Board of Trustees was established by the General Convention of 1820, it included all Episcopal bishops, twelve (12) clergy and twelve (12) lay persons appointed by the House of Deputies. At one point, each diocese of the Church appointed trustees, based on the number of clergy in the diocese. In 1874, the House of Deputies adopted a resolution to form a committee to study the number of General Seminary Trustees and how the number might be decreased in order to improve efficiency. In 1985, General Convention approved an amendment to the Constitution of the General Theological Seminary establishing the current makeup of General's Board of Trustees: two (2) bishops appointed by the House of Bishops, two (2) presbyters and two (2) lay persons appointed by the House of Deputies, twenty-four (24) appointed by the Board of Trustees itself, and nine (9) Trustees appointed by the General Theological Seminary Alumni.

The Constitution and Canons of the General Convention do not reference the General Theological Seminary. The only reference appears in the Joint Rules of Order of the House of Bishops and the House of Deputies:

VII. Joint Standing Committee on Nominations
> *17. There shall be a Joint Standing Committee on Nominations, which shall submit nominations for the election of:*
> *(a) Trustees of the Church Pension Fund, serving as the Joint Committee referred to in Canon I.8.2.*
> *(b) Members of the Executive Council under Canon I.4.1(d).*
> *(c) The Secretary of the House of Deputies and the Treasurer of the General Convention under Canons I.1.1(j) and I.1.7(a).*
> *(d) Trustees of the General Theological Seminary.*
> *(e) General Board of Examining Chaplains.*
> *(f) Disciplinary Board for Bishops.*

The requirement for concurrent action of the General Convention and the Board of Trustees to amend the Constitution of the General Theological Seminary is the only formal relationship between the two (2) entities.

ACKNOWLEDGEMENT OF THE COMMITTEE'S ORIGINS
The Committee acknowledges that the original Resolution D075 - which ultimately led to the amended resolution and the formation of this Committee - was born from concern surrounding

events at the General Theological Seminary in the fall of 2014. These events, which culminated in several faculty members' dismissal and resignation under conflicted circumstances, reverberated throughout the Church. Frustration was felt on many sides: by those involved in these events; by those with ties to the General Theological Seminary; and by those who simply love the Church and desire the best for all of our relationships. Questions remain about lines of communication, accountability, and our responsibility to one another as members of the body of Christ.

Resolution D075 did not expressly address the issues of 2014 at the General Theological Seminary, and therefore neither has the Committee. Nonetheless, the Committee has heard others express their continued anger, pain, and grief over their perception of those events. The Committee feels this must be acknowledged, and hopes that its work is a step towards strengthening formal and informal relationships throughout the Episcopal Church.

RESEARCH AND INFORMATION GATHERING

The Committee considered its mandate and quickly determined input was needed from as many sources as possible. A nine (9) question survey was prepared:

1 What is your ministry status in the Episcopal Church?
2 Are you a member of the General Theological Seminary community?
3 Are you a member of the General Convention?
4 How familiar are you with the historical relationship between the General Convention and the General Theological Seminary?
5 Do you believe the current relationship between the General Convention and the General Theological Seminary is beneficial?
6 Do you believe the General Convention and the General Theological Seminary should have a relationship today?
7 Do you believe the relationship between the General Convention and the General Theological Seminary should be strengthened?
8 Is there anything else you would like to share with us about your understanding of the relationship between the General Convention the General Theological Seminary?
9 Would you be willing to be contacted for follow-up questions?

The survey was published online on August 1, 2016. Thereafter, the Committee used a variety of venues within the Church to broadcast the availability of the survey and invite participation.

E-mail notification was sent directly to members of the General Convention through the HoB/D listserv, to the Dean of the General Theological Seminary, and to the General Theological Seminary Alumni Executive Committee. No additional e-mail lists were made available to the Committee.

The Episcopal News Service published an article which described the survey and contained a link to it. Subsequently, the article containing the link was published by Episcopal Cafe on November 29, 2016. The link was also posted on several Facebook pages. The Committee also met with various groups in person at the General Theological Seminary on February 2 and 3, 2017. During each meeting, the Committee encouraged completion of the survey.

As of August 1, 2017, when data collection was concluded, a total of five hundred and thirty-nine (539) responses had been received. A summary of the survey results is attached as an addendum to this report.

On February 2, 2017, the Committee met separately with members of the General Seminary Alumni Association Executive Committee, representatives of the current General Theological Seminary student body and faculty representatives. On February 3, the Committee met with the General Theological Seminary Board of Trustees. In each meeting, three (3) questions from the survey were put forth for consideration:

1 Is the relationship between the General Convention and the General Theological Seminary mutually beneficial?
2 Should it continue?
3 Should it be strengthened?

As Chair of the Committee, Bishop Williams had several conversations with others who could give a perspective not readily available through written and oral surveys. These conversations included the President of the House of Deputies, the Secretary of the House of Deputies, the Canon to the Presiding Bishop, the Chair of the General Theological Seminary Board of Trustees, the President of the General Seminary Alumni Association, and the Deans of the accredited seminaries of The Episcopal Church, including the Dean of the General Theological Seminary.

The information gathered by the Committee yielded remarkably similar themes across constituencies. It was difficult to discuss the relationship between the General Convention and the General Theological Seminary without discussing the relationship between the General Convention and all Episcopal seminaries. Discussions led to conversations regarding the overall state of theological education in the Church, and what it means to receive an Episcopal theological education. Most discussions raised related issues such as local formation, online education, non-Episcopal seminary education, and theological education for both lay and ordained church leaders.

The greater majority of participants, in person and through the survey, expressed a strong desire for strengthening relationships - and accountability - between the General Theological Seminary, other seminaries, and the General Convention. Most agree the current relationships are not mutually beneficial, but few have concrete ideas of what mutually beneficial relationships might look like.

CONCLUSIONS

This Committee concludes that the relationship between the General Convention and the General Theological Seminary is not mutually beneficial.

From the perspective of the General Convention:

1. The General Convention has no oversight of the General Theological Seminary.
2. The General Theological Seminary and the Episcopal Church are cut off from one another in terms of official communication. In times of difficulty, there is no mechanism to influence the Board of the General Theological Seminary.
3. The General Theological Seminary has a formal relationship with the General Convention, established through the Seminary's Constitution. Other seminaries and local schools of theology have no formal relationship with the General Convention.
4. There is no vehicle to adequately address theological education and its reform within the church governance structure.

From the perspective of the General Theological Seminary:

1. The current relationship restricts the ability of the General Theological Seminary to make changes to its Constitution.
2. The requirement of concurrent action by the General Convention and the Board of Trustees of the General Theological Seminary necessitates a delay of up to three (3) years in amending the Seminary's Constitution.
3. The current size of the Board of Trustees is unwieldy and makes the nimbleness needed for effective governance difficult.
4. There is no clear way to identify vision and outline concerns between entities, which inhibits the wider church in providing guidance and support to the General Theological Seminary.
5. The General Convention provides no funding or resources to assist the General Theological Seminary.
6. There is no vehicle to provide the General Theological Seminary access to and collaboration with the wider Episcopal Church, its vision and mission.
7. Although a number of bishops sit on the Board of Trustees of the General Theological Seminary, there is no established vehicle for the General Theological Seminary to communicate with the House of Bishops, whose members are ultimately responsible for the form and focus of residential theological formation.
8. There is no required reporting, which would provide information about the status of the General Theological Seminary to the General Convention.

9. There is no established means of input from the General Theological Seminary on theological education and training as it is undergoing evolution throughout the Episcopal Church, including new models of local, regional, online and residential formation.

Potential benefits of an improved relationship between the General Convention and the General Theological Seminary could include:

1. Clear buy-in from the Episcopal Church on the success and challenges of the General Theological Seminary.
2. Eliminating isolation of the General Theological Seminary as it confronts challenges in the execution of its mission.
3. All seminaries could benefit from a relationship with the General Convention. The General Convention and seminaries could partner on issues of theological education and residential formation. Similar relationships exist in most other mainline denominations. Resources of the Church could then be utilized at the seminary and diocesan level to achieve the greatest impact and develop diversity and theological voice.
4. The current seminary system in the Episcopal Church faces challenges: rising costs, dwindling enrollment, and the feasibility of the three (3) year residential model. This causes a competitive rather than a collaborative environment. Clear communication, accountability, and shared resources could strengthen the Church's ability to face these challenges in the 21st century.

RECOMMENDATIONS

Based on the mandate of D075, the input of a variety of constituents from throughout the Episcopal Church, and time in discernment and contemplation, the Committee makes the following recommendations regarding the relationship of the General Convention and the General Theological Seminary:

1. Reduce the number of General Convention-elected trustees to the General Theological Seminary Board from two (2) bishops, two (2) presbyters and two (2) laypersons to one (1) bishop, one (1) presbyter, and one (1) layperson.
2. Adopt a resolution to amend Article III of the Constitution of the General Theological Seminary reducing the size of the Board of Trustees overall. General Seminary's board is currently one of the largest among Episcopal seminaries.
3. Require the General Theological Seminary Trustees elected by the General Convention to report to the Executive Council annually, to improve communication and accountability to the body that elected them.
4. Require the President and Dean of the General Theological Seminary to report to Executive Council annually, to improve relationships and assist in developing overall ownership of the success of the

General Theological Seminary and vision of inclusion whereby the General Theological Seminary becomes fully part of the overall Episcopal Church.

5. Create a mechanism to enable integration of the work of the General Convention and the General Theological Seminary, whether it is oversight or some other formalized relationship.

THE COMMITTEE ALSO MAKES THE FOLLOWING RECOMMENDATIONS REGARDING THE GENERAL CONVENTION AND ITS RELATIONSHIP WITH ALL SEMINARIES AND OVERALL SUPPORT OF THEOLOGICAL EDUCATION

1. Create a Standing Committee on Theological Education.

2. Create a position of Staff Officer for Theological Education.

3. Establish relationships between the General Convention and all Episcopal seminaries, which would include annual meetings with and reports to Executive Council by board members and deans of seminaries.

4. Establish a budgetary line item that supports theological education in all Episcopal seminaries, to be discussed, supported and incorporated into the overall budget of the Episcopal Church.

5. Implement the attached Resolution.

Summary: The Episcopal Church/the General Convention should coordinate their efforts to assure mutual accountability with established seminaries and emerging theological formation programs, including staffing, reporting, funding, development and implementation of a common vision.

Proposed Resolution

Resolution A007 Proposing the Establishment of a Committee to Study the Relationship of Episcopal Seminaries with the General Convention, One Another and the Wider Church

Whereas, as we move into a time of evangelization and clarification in our branch of The Jesus Movement, having a coherent vision and mission for all seminaries will help strengthen the formation and education of lay and ordained leaders. And whereas a coherent vision assumes close working relationships with all seminaries so that we can appropriately steward all available resources to meet the needs of the Church in the 21st century,

Be it *resolved,* That a committee should be formed to carry out an investigation related to this work. This committee would be empowered to study and make specific recommendations regarding the restructuring of the relationship between the General Convention and those leaders engaged in theological formation, including the Episcopal seminaries. Its work would also include:

- Exploring the sharing of resources among the seminaries
- Reviewing the structure and relationship of other judicatories and their seminaries (especially ELCA)

- Consulting with the Association of Theological Schools regarding accreditation
- Surveying Bishops and diocesan Commissions on Ministry to determine their needs for theological education
- Reviewing seminary budgets and curriculum
- Surveying the student bodies to determine size and diversity
- Considering the possibility of elected/appointed representation of the General Convention on seminary boards of trustees
- Providing funding from the General Convention budget to be allocated for the work of seminaries
- Exploring how and where theological education and formation for ordination are being pursued throughout the Episcopal Church beyond its accredited seminaries including the exploration and review of local and alternative formation programs
- Exploring/reviewing theological formation for lay leadership

The committee would report regularly to the Executive Council between conventions and submit a final report to the General Convention 2024. An Interim Report would be provided to General Convention in 2021.

Membership:
The committee would be comprised of: two (2) bishops, two (2) priests/deacons, two (2) lay persons, one (1) dean of students/academic dean, one (1) seminary president, one (1) member of Executive Council and one (1) staff representative/consultant from the Episcopal Church.

Committee Budget:
Much of this committee's work would be carried out through online communications vehicles, however there would be periodic in person meetings. Seminary presidents/deans might meet in person to discuss strategies. Committee members might meet with the boards of Episcopal seminaries and various non-Episcopal seminaries. The committee may also convene a gathering of seminary representatives and students during the triennia.

Budget

Initial Request: $33,000 per annum.

Continuance Recommendation

This committee recommends implementation of a new committee to continue the work identified in our recommendations.

Supplemental Material

The Committee to Study the Relationship of General Seminary and General Convention Online Survey Data - August 1, 2016 to August 1, 2017
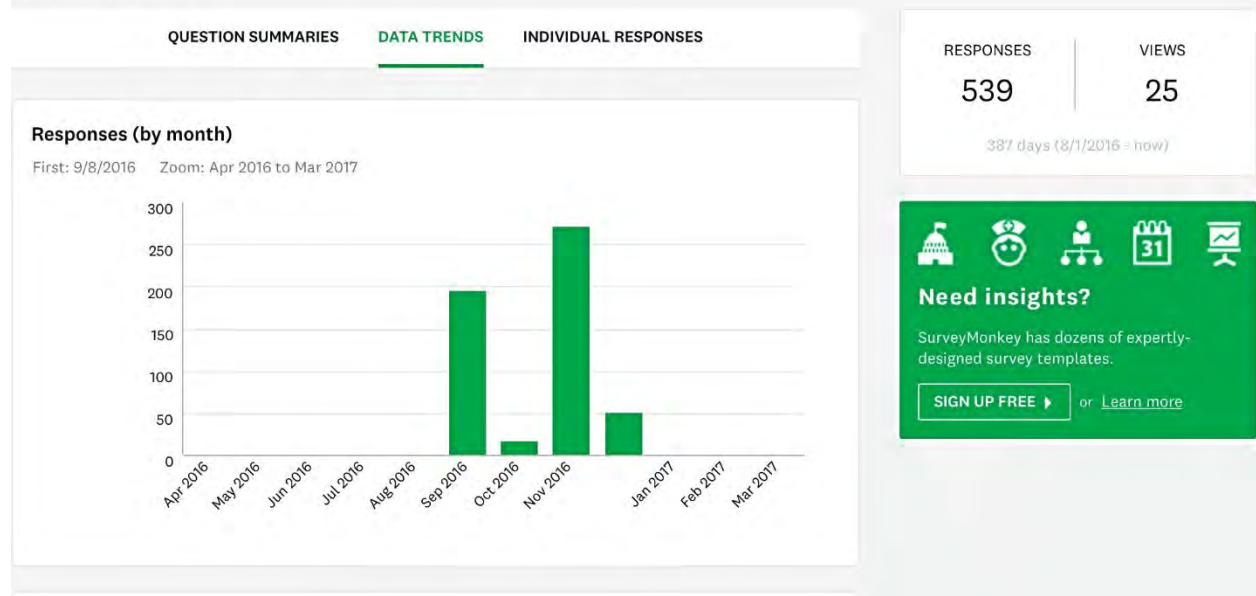
Q1

What is your ministry status in the Episcopal Church? (choose one)

Answered: 539   Skipped: 0
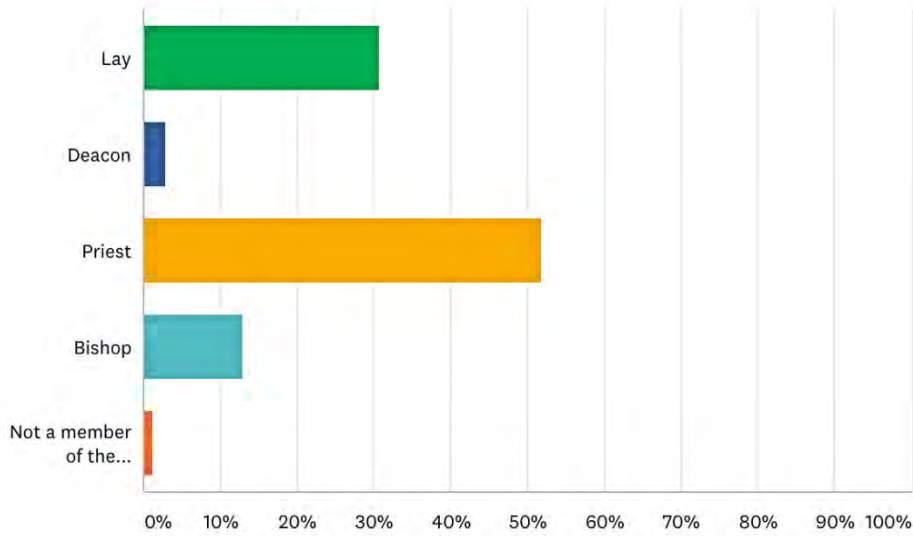
ANSWER CHOICES	RESPONSES	
Lay	30.80%	166
Deacon	2.97%	16
Priest	51.95%	280
Bishop	12.99%	70
Not a member of the Episcopal Church	1.30%	7
TOTAL		**539**

Q2

Are you a member of the General Seminary community? (choose one)

Answered: 539   Skipped: 0
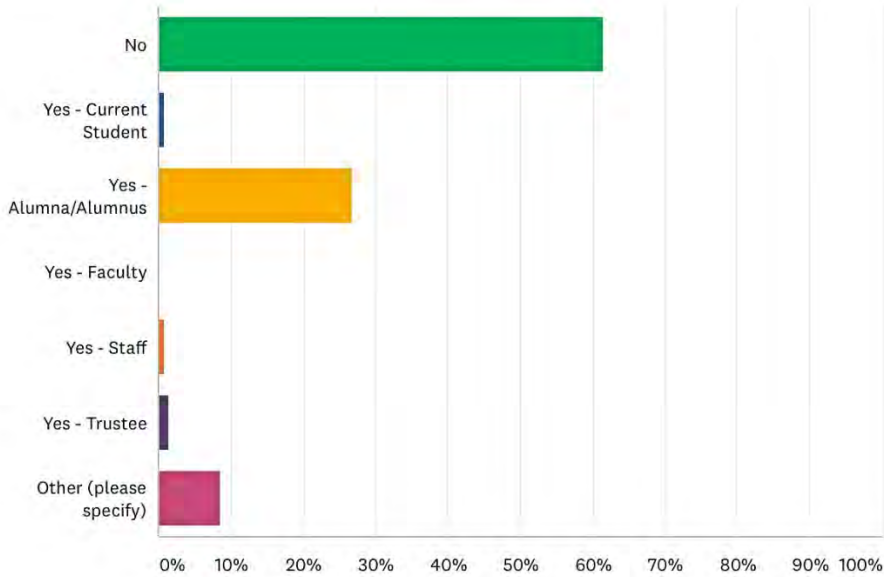
ANSWER CHOICES		RESPONSES	
No		61.60%	332
Yes - Current Student		0.74%	4
Yes - Alumna/Alumnus		26.72%	144
Yes - Faculty		0.19%	1
Yes - Staff		0.74%	4
Yes - Trustee		1.48%	8
Other (please specify)	Responses	8.53%	46
TOTAL			539

Q3

Are you a member of General Convention? (choose one)

Answered: 539   Skipped: 0
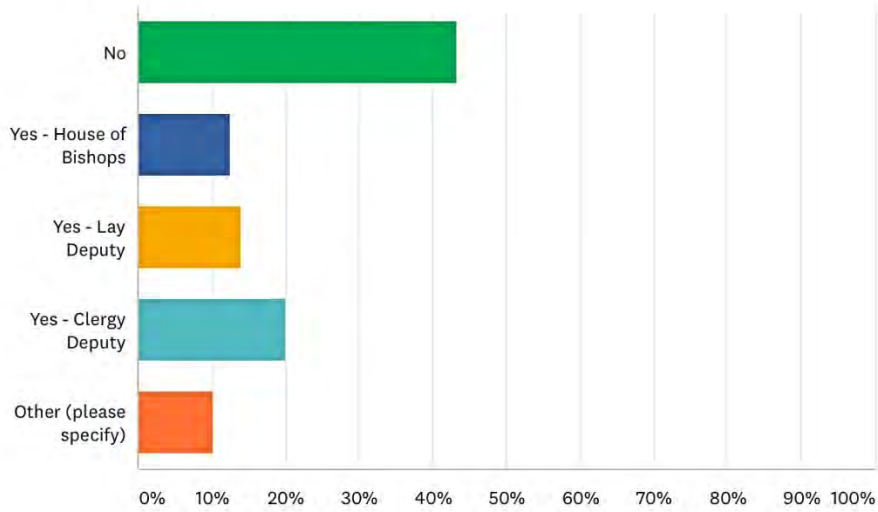
ANSWER CHOICES		RESPONSES	
No		43.23%	233
Yes - House of Bishops		12.62%	68
Yes - Lay Deputy		13.91%	75
Yes - Clergy Deputy		20.04%	108
Other (please specify)	Responses	10.20%	55
TOTAL			539

Q4

How familiar are you with the historical relationship between General Convention and General Seminary? (choose one)

Answered: 539   Skipped: 0
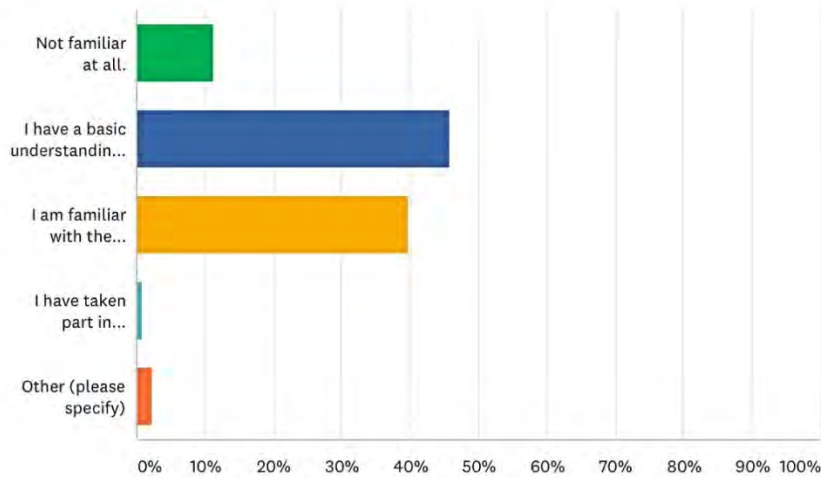
ANSWER CHOICES		RESPONSES	
Not familiar at all.		11.32%	61
I have a basic understanding of how General Seminary was started.		45.83%	247
I am familiar with the Canons/Resolutions of the Episcopal Church and what they say about this relationship.		39.70%	214
I have taken part in drafting/establishing Resolutions pertaining to the ongoing relationship.		0.93%	5
Other (please specify)	Responses	2.23%	12
TOTAL			539

Q5

Do you believe the current relationship between General Seminary and General Convention is beneficial? (choose one)

Answered: 539   Skipped: 0
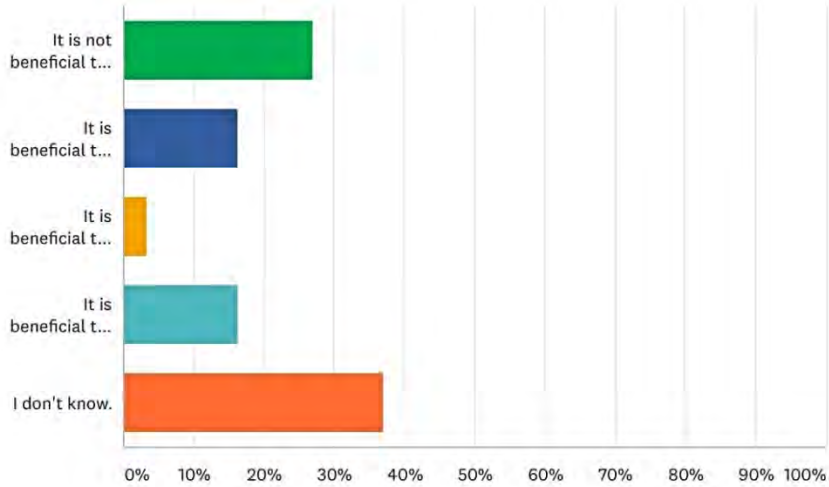
ANSWER CHOICES	RESPONSES	
It is not beneficial to either General Seminary or General Convention.	26.90%	145
It is beneficial to General Seminary but not to General Convention.	16.33%	88
It is beneficial to General Convention but not to General Seminary.	3.34%	18
It is beneficial to both General Seminary and General Convention.	16.33%	88
I don't know.	37.11%	200
TOTAL		539

Comments (248)

Q6

Do you believe that General Convention and General Seminary should have a formal relationship today? (choose one)

Answered: 539   Skipped: 0
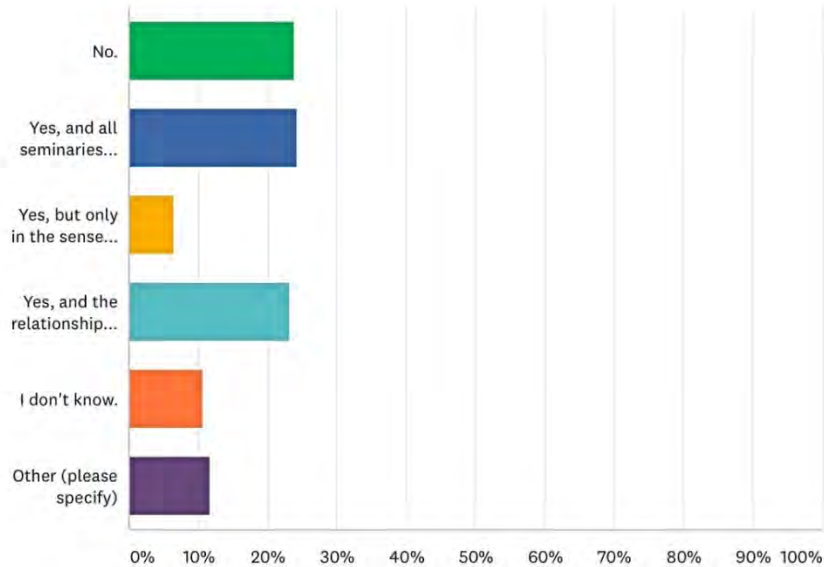
ANSWER CHOICES		RESPONSES	
No.		23.75%	128
Yes, and all seminaries should have a formal relationship with General Convention.		24.30%	131
Yes, but only in the sense of preserving the unique history between the two.		6.49%	35
Yes, and the relationship should have some sort of accountability from both.		23.19%	125
I don't know.		10.58%	57
Other (please specify)	Responses	11.69%	63
TOTAL			539

Q7

Do you believe the relationship between General Convention and General Seminary should be strengthened? (select all that apply)

Answered: 539   Skipped: 0
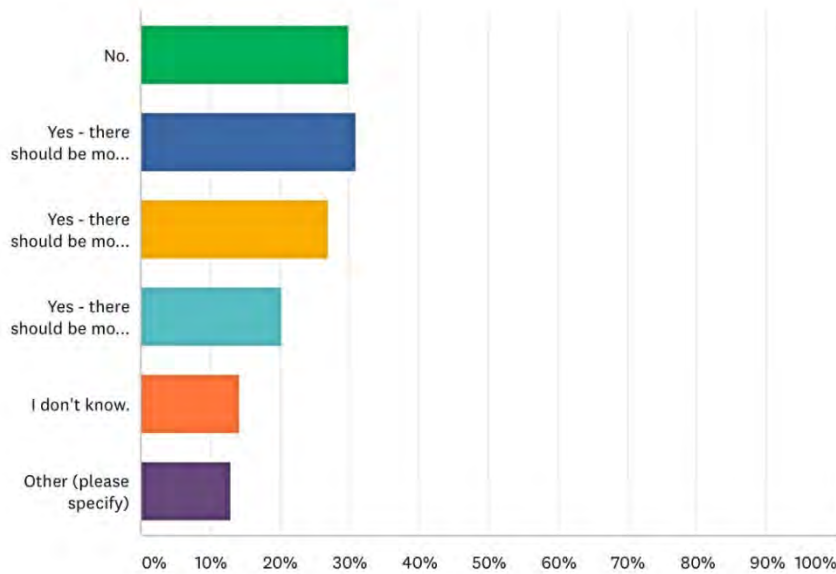
ANSWER CHOICES	RESPONSES	
No.	29.87%	161
Yes - there should be more accountability between them.	30.98%	167
Yes - there should be more education about the relationship.	27.09%	146
Yes - there should be more oversight by General Convention.	20.22%	109
I don't know.	14.29%	77
Other (please specify) Responses	12.99%	70
Total Respondents: 539		

Q8

Is there anything else you would like to share about your understanding of the relationship between General Seminary and the General Convention?

All open-ended responses were coded and categorized. Many of the answers simply said 'No' or 'I have nothing else to add'.

Of the substantial responses, the following twenty (20) general statements summarize the majority viewpoints, in descending order:

1. We must look at the broader issue of theological education reform.

2. The General Convention should be in relationship with - and mutually accountable to - to all seminaries.

3. The General Convention should hold the General Theological Seminary accountable for its decisions and questionable actions during the faculty crisis of 2014.

4. The General Theological Seminary needs financial support from the General Convention.

5. The relationship between the General Convention and the General Theological Seminary should end.

6. It would be a loss to the church for the historic relationship between the General Convention and the General Theological Seminary to end.

7. I have no idea what is going on here.

8. The General Theological Seminary needs help returning to a strong, healthy place and the General Convention should give it.

9. There is not a lot that the General Convention can do for the General Theological Seminary.

10. The General Theological Seminary is suffering from years of terrible decision-making and lack of leadership.

11. The General Theological Seminary can and should become a model for the future of theological education.

12. What is the relationship between the General Convention and the General Theological Seminary now?

13. The General Theological Seminary and the Episcopal Church Center (815 Second Avenue in New York) should have merged when they had the chance.

14. I am grieved and heartbroken over what has happened at the General Theological Seminary.

15. The General Theological Seminary needs to broaden its perspective and appeal.

16. When does it mean to be an 'Episcopal' seminary today?

17. What would a mutually beneficial relationship between the General Convention and the General Theological Seminary look like?

18. The relationship between the General Convention and the General Theological Seminary has always been fraught and complicated.

19. There is no actual relationship between the General Convention and the General Theological Seminary.

20. The General Theological Seminary should be closed.

Q9

We may be interested in asking follow-up questions of some people who answer this survey. If you are willing to answer follow-up questions, please provide your name and contact info below. We may not contact everyone who offers information.

Answered: 271   Skipped: 268

ANSWER CHOICES		RESPONSES	
Name	Responses	99.63%	270
Company	Responses	0.00%	0
Address	Responses	0.00%	0
Address 2	Responses	0.00%	0
City/Town	Responses	0.00%	0
State/Province	Responses	0.00%	0
ZIP/Postal Code	Responses	0.00%	0
Country	Responses	0.00%	0
Email Address	Responses	99.26%	269
Phone Number	Responses	90.04%	244

Over two hundred and fifty (250) survey respondents supplied an e-mail addresses or telephone number for follow-up conversation. This far exceeded the ability of the Committee to contact, so a sample was chosen.

In order to choose follow-up recipients, the Committee first considered the demographics of the majority of those who answered the survey: General Convention deputies, priests, and bishops, with some of those categories overlapping. The Committee also considered the demographics of the groups at in-person meetings.

Weighing this data against all survey respondents, the Committee chose a random contact sample from the least well-represented groups: lay people, clergy who are neither Trustees nor alumni of the General Theological Seminary, and those with indirect relationships to the General Theological Seminary such as former students (not alumni) and spouses or other family of students, trustees, staff and faculty. From members of these groups who had offered contact information, the Committee

selected twenty-five (25) and randomly assigned five (5) people to each Committee member for contact.

The vast majority of those contacted (21) did not reply, or simply replied that they had nothing more to say. Those who did respond gave largely the same overall opinions already collected:

1. The General Convention should have a relationship with the General Theological Seminary and so should all seminaries.
2. The relationship between the General Convention and the General Theological Seminary should be strengthened.
3. Theological Education should be explored by the General Convention in a comprehensive manner.
4. There is still a great deal of pain and anger within the Episcopal Church over the events of 2014 at the General Theological Seminary.

TASK FORCE FOR LATINO/HISPANIC CONGREGATIONAL DEVELOPMENT AND SUSTAINABILITY

Membership

Mr. Antonio J. Gallardo, Ph.D., *Chair*	Los Angeles, VIII	2018
The Rev. Tom Callard	Western Massachusetts, I	2018
The Rev. Victor H. Conrado	Chicago, V	2018
The Rt. Rev. Dan T. Edwards	Nevada, VIII	2018
Ms. Karla Fernandez Parker	Texas, VII	2018
The Rev. Ed Gomez	Texas, VII	2018
The Very Rev. Miguelina Howell	Connecticut, I	2018
Ms. Wendy Pineda	Texas, VII	2018
The Rev. Oscar A. Rozo	Milwaukee, V	2018
Ms. Teresa Taboas	Puerto Rico, IX	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018
The Very Rev. Dr. Brian Baker, *Liaison of Executive Council*	Northern California, VIII	2018

CHANGES TO MEMBERSHIP

In September 2016, The Rev. Oscar Rozo replaced The Rev. Roberto Arciniega (Oregon, VIII), and in October 2016 Ms. Ariana Gonzalez-Bonillas (Arizona, VIII) requested to be released from her membership in the Task Force.

Mandate

Resolution 2015-A086:

The House of Bishops 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 Church wide Network of Partners on Latino/Hispanic Congregational Ministry Development to provide coaches and mentors who will work with congregations, lay leaders, clergy, and diocesan staff to implement the provisions of General Convention [GC] Resolution A-086.

That the 78th General Convention direct the Office of Latino/Hispanic Ministries, in collaboration with the Network of Partners 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 the Network of Partners 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 Network of Partners 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 Network of Partners 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 and other ecumenical partners; and provided educational and media resources that are easily accessible; and be it further

Resolved, That the Network of Partners 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.

Summary of Work

EXECUTIVE SUMMARY

The Office of the Latino/Hispanic Ministries aims to accomplish its work through: "Building Capacity, Building Communities, Making Disciples."

The Episcopal Church has recognized the radically changing demographics that show that Latino/Hispanics are one of that fastest growing groups in the United States. The Church has also decided, as stated in the Strategic Vision for Reaching Latinos/Hispanics (2009), to strive to be "courageous, resourceful, passionate and enthusiastic in its response to these new circumstances." Moreover, in that same strategic vision document, the Church has stated that "We can grow vibrant

and fruitful Churches by inviting the Latino/Hispanic community to a welcoming and inclusive environment, sharing our rich liturgy and implementing innovative and pertinent program."

With this Vision in mind, and as stated in its website, the Church has tasked the Latino/Hispanic Ministries [LHM] office with providing guidance in "forming hospitable communities of faith that nourish, strengthen, and develop disciples of Christ in the Anglican tradition within Spanish-speaking communities."

At the 78th General Convention, the Church affirmed the great work that the LHM Office has done in support of the Church's Strategic Vision of vibrant and fruitful Churches, and recognized the need to invest additional resources, through the approval of Resolution 2015-A086.

To determine the most effective and efficient way to invest these funds the leaders of the task force were tasked with designing and implementing a plan to further the work of the Church in support of existing and new Spanish-speaking communities, while addressing the systemic challenges that these communities may face, and that only support from Church-wide efforts could address.

To date, the work of this Task Force has strengthened and expanded existing program activities of the LHM office, and it has created new program activities and resources to support dioceses, congregations, and individuals in their journey to serve Latino/Hispanics. These comprehensive efforts are aimed to provide support for those considering to serve Latino-Hispanics, those who are in the exploration phase, as well as for those already serving this population.

For those in the exploration phase, the task force is building upon two (2) existing program activities: New Camino and the Mission Developer Training. New Camino is a two (2) day conference intended to encourage and equip Dioceses to start and support Latino/Hispanic ministries. Ten (10) years ago, Dioceses and parishes that started Latino-Hispanic ministries may not have had a solid foundation to know about what it takes to serve Latino-Hispanics as the one provided by New Camino. In this triennium, the task force has set the goal of supporting at least nine (9) Dioceses, five (5) of which it has already supported.

Once Dioceses and/or parishes decide to serve Latino-Hispanics, there will be resources available to support clergy and administrative staff in their journey. This Task Force has developed an extensive array of congregational development resources such as social media training, digital evangelism, cultural competency programs and specific social media and evangelism resources. By the end of 2017 there will be an initial supply of twelve (12) bilingual e-blast templates, twenty (20) Facebook videos, and twenty-five (25) memes that congregations serving Latino-Hispanics can use in their outreach and formation efforts.

To address the reality of a very limited pipeline of ordained clergy of either Latino-Hispanic background, or clergy who are linguistically and culturally competent to serve Latino-Hispanics, this Task Force has designed and implemented a cultural-competency program in conjunction with three (3) Episcopal seminaries (Seminary of the Southwest, Bexley-Seabury, and Bloy House).

Moreover, for congregations, lay leaders, clergy, and diocesan staff serving Latino-Hispanics, the task force will train thirty-one (31) mentors / coaches that will work with them. These unprecedented number of coaches will be available to assist clergy, Church planters, diocesan staff, seminarians, and others in enhanced decision-making skills, greater interpersonal effectiveness and increase confidence in serving Latino-Hispanics.

To complement and strengthen the work of diocesan / parish clergy and staff, the Task Force will complete the development of the resources needed for a fully scalable lay formation program: The Academia Ecuménica de Liderazgo. To date, more than two hundred (200) facilitators, from more than seventy-five (75) congregations representing twenty-five (25) Dioceses, have been equipped to deliver the self- contained and fully portable formation materials aimed to foster Latino/Hispanic lay leadership.

All of these efforts to provide Church wide resources for Dioceses and congregations in support of the Church's vision for Spanish-speaking communities will be strengthened, be known, disseminated and enhanced through the increasingly extensive Church wide network of partners on Latino/Hispanic congregational ministry development. The network of Latino Diocesan Ministers is an example of such effort to promote support for their own ministries, and increase awareness of the resources available through the LHM office. National conferences like Nuevo Amanecer and Nuevos Horizontes, with a constant increasing attendance, are proving to be the gathering place for Latino-Hispanics and their allies in embracing the gifts of the Latino-Hispanics in the Episcopal Church.

In this report, we are sharing with you how much has been done with the resources under Resolution 2015-A086 to advance the vision of the Church to embrace Latino-Hispanics. We all know that there still much more to be done, and we hope that at the very least, the seeds of hope that have been planted through these efforts continue to be nourished to grow into the fullness of what the Church has envisioned.

The members of the Task Force saw this Resolution as an opportunity to expand the work of the Office of the Latino/Hispanic Ministries [LHM], while planting some seeds for future work. The Task Force also started its work from the principle that the Resolution was not a new beginning or a restart, but rather a mandate to expand the existing efforts of the Office of Latino/Hispanic Ministries, and to create new resources that, in the past, had only been a dream.

To accomplish our mandate in a systematic and productive manner, the Task Force organized itself into the following sub-committees:

- Church-wide network of partners on Latino/Hispanic congregational ministry development: Ms. Wendy Pineda, and the Very Rev. Miguelina Howell;

- Formation and leadership development resources and programs to meet the needs of clergy and lay leaders currently serving in LHM: Ms. Teresa Taboas, and the Rev. Oscar Rozo;

- Mentoring and coaching of clergy currently working in LHM: The Rt. Rev. Dan Edwards, and the Rev. Ed Gomez;

- 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: The Very Rev. Tom Callard, and Ms. Karla Fernandez Parker.

- Cultural-competency training program for diocesan staff members, seminarians, clergy, and lay leaders: The Rev. Victor Conrado, the Rev. Oscar Rozo and the Rev. Ed Gomez.

During this triennium, the Task Force has met twice in face-to-face gatherings, and via video conferencing quarterly. Each subcommittee developed a vision for their work area, stating how they would like to see the Latino/Hispanic Ministry in the Church at the end of the triennium, and from that vision they developed work plans. The work plans were also developed building upon the strengths of the existing work, the potential in other opportunities identified, and minimizing existing weaknesses.

Each subcommittee also had an initial budget allocation, which was revised along the way according to the progress made in the implementation of the work plans, and as opportunities and challenges were identified.

The subcommittees have followed this approach in their work:

- Full understanding the existing work being done by the Office of Latino/Hispanic Ministries of the Episcopal Church;

- Continue the work already on the ground;

- Taking an inventory of additional existing efforts;

- Defining specific, measurable, attainable, realistic, and time-limited [SMART] goals for their work during the triennium;

- Defining the baseline for the current status of the intended outcomes;

- Integrating the work of all the sub-committees to avoid duplication and promote synergies;

- Seeking opportunities to work along with other Task Forces on areas of common vision (like Resolution 2015-D005: Create a Church-wide Network for Planting Churches).

Below you will find, in detail, the accomplishments achieved in each work area in the implementation of the vision and mandate of Resolution 2015-A086.

CHURCH-WIDE NETWORK OF PARTNERS ON LATINO/HISPANIC CONGREGATIONAL MINISTRY DEVELOPMENT

The vision for the work of this subcommittee is that at the end the triennium: "We have expanded the existing Church-wide network of ministry leaders."

Even before the Resolution, the Office of Latino/Hispanic Ministries has been diligent in the area of creating a Church wide network of partners, through various efforts such as: its biannual conference Nuevo Amanecer; mission developer training and strong social media presence. The Office has focused on building capacity for many years, and the goal of this area of the Resolution was to expand that work. This part of the implementation focused on three (3) under-represented groups in Latino/Hispanic Ministries: Province IX, the Latino Diocesan Missioners, and Seminarians. The selection of these groups was strategic, as we considered the overarching power of these constituencies in the life of the Church, and because they have been on the fringes.

Province IX is composed of seven (7) dioceses across Latin America and the Caribbean. For many years, the bishops and lay leaders of Province IX have expressed a sense of isolation and separation from the ministry of the wider Church. In an effort to strengthen the bond of ministry, and its partnership with Province IX, the Office of Latino/Hispanic Ministries and the Task Force identified ways in which partners in Province IX would experience a greater connection with the wider Church. As we live and serve God in the 21ˢᵗ Century, it was also imperative to recognize the power of digital evangelism, social media and virtual connectivity.

As a result, we conducted two (2) intensive communication trainings focused on the following areas:

- Digital evangelism
- Social media management
- Written communications
- Video production
- Interviewing skills

The first training was hosted in the Dominican Republic from September 6 – 9, 2016. Three (3) participants from each diocese as well as their bishops were invited to attend. A total number of thirty-one (31) persons, mostly lay, attended from all seven (7) dioceses of Province IX, plus a representative each from Mexico, Costa Rica, El Salvador, and Panama. Five (5) bishops also attended. The four (4) day intensive training provided the fundamentals of photography, video editing, video conferencing and social media. A final product was the sharing of a strategy that each group would initiate in their

respective dioceses. Two (2) of the attendees from this event were selected to serve as trainers for the second training session in Panama.

The second training (hosted at the request of the Damas Episcopales [ECW] of Province IX) took place in Panama on August 14 – 17, 2017. This training was designed to strengthen the Provincial Women's Network for better communication and promotion utilizing social media. Out of this training each diocese presented a plan that they would put into practice over the coming months after the training. All seven (7) dioceses from Province IX participated, along with the Diocese of Panama. There were twenty-three (23) women in attendance to this training.

Overall, providing these opportunities for capacity building and connectivity has already shown fruits as our partners in Province IX are actively engaging the wider Church in numerous and varied ways.

The Latino Diocesan Missioners. It was an initiative of this Task Force to bring together a diverse group of diocesan leaders to form a network to help support their local ministries, as well as to be more connected to the leadership provided by the Office of Latino/Hispanic Ministries. Few dioceses have a full- or even part-time Latino Missioner, and so in many cases the diocesan leader is the chair of their Latino ministry commission. Thirty-three (33) of the seventy-two (72) missioners that we identified gathered in Miami, Florida, on August 8 – 11, 2017. Four (4) of the participants came from Province IX. They explored ways to connect with the Office of Latino/Hispanic Ministries more fully; create a support network; and share more widely the work being done across the Church in this network. This network is a matrix of collaboration that will work in collaboration with the LHM Office.

This newly formed network of partners will be a key component of the next stage of growth for the Latino/Hispanic Ministries of the Episcopal Church.

Their vision is that, as a united culture, they will empower and connect themselves and those in the ministry to better serve all God's people. A resource list is being created so new parishes don't need to reinvent the wheel, and the Episcopal Asset Map is being enhanced so that those who wish to start a new ministry can find people with whom to connect. A subgroup will reconvene in the spring of 2018 to develop plans, and create SMART goals before the next meeting in Fall 2018.

Seminarians who are interested in participating or learning about Latino Ministries may not have opportunities to expand their knowledge or connect with a network because of their studies and limited financial resources. Through the funding of Resolution 2015-A086, our Task Force created an opportunity for seminarians to attend Nuevo Amanecer 2016 [NA2016]. This conference is a hub of networking and development for the core leadership of the communities where approximately thirty thousand (30,000) Latino Episcopalians worship in the United States. This event also includes a small representation from Province IX. This four (4) day program is designed to connect Latinos and non-

Latinos involved in this common ministry through capacity building, fellowship and sharing of best practices.

Seminarians who received scholarships to attend Nuevo Amanecer were asked to share their experience in a formal setting at their sponsor parish as a way of spreading the word and creating interest in our ever-growing ministry. Seminarians were also required to present a digital testimony of the impact of their presence at NA2016 in the context of their interest and future involvement in Latino/Hispanic Ministries. Thanks to this effort, nine (9) seminarians attended Nuevo Amanecer in 2016 and the Task Force plans to increase the number of participants in Nuevo Amanecer 2018.

In the past eight (8) years, the number of Episcopalians attending Nuevo Amanecer has more than doubled, from one hundred and eighty-nine (189) attendees in 2008 to four hundred and sixty-two (462) attendees in 2016.

FORMATION AND LEADERSHIP DEVELOPMENT RESOURCES

The vision for the work of this subcommittee is that at the end the triennium: "We have accessible resources to provide formation and training for lay and clergy leaders. There is a training program up and running. We partnered with others to expand opportunities."

Academia Ecuménica de Liderazgo. The Jesus Movement in our ministry is encountered in many ways. One of the most important pieces of LHM has been to offer Christian formation for lay leaders, and to promote their leadership skills in their congregation as well as in the entire Church. Academia Ecuménica de Liderazgo is a hybrid program (online and face to face in small groups) created in conjunction with the Evangelical Lutheran Church of America [ELCA], and that is guided by lay leaders who serve as facilitators for the lay participants.

The program consists of twelve (12) courses presented through videos and small group reflection. Topics include: Evangelization and Mission in the 21st century, the Bible, Church History, Liturgy, Book of Common Prayer and Stewardship, among others. The idea is for the group to watch video segments of approximately thirty (30) minutes and then have a theological reflection about the topic. The concept of theological reflection is synthesized to be able to encounter God in that specific situation, including those simple things that happen in daily life. The method used for the reflection is one of the most common approaches used in Latin America and consists of three (3) steps: *ver (see), pensar (think), actuar (act).*

1. See and understand what is being presented.

2. What is God trying to tell us? How can we see God's presence there?

3. What is God inviting me to do? In what ways can I respond to God?

A typical class will include prayers, hymns, games, the video presentation and the theological reflection.

We have presented this training more than fifteen (15) times: at least nine (9) times in the USA (Los Angeles, CA; Alexandria, VA; New York, NY; Miami, FL; Houston, TX; Dallas, TX; Chicago, IL; Connecticut; New Jersey). and in the following dioceses of Province IX: Honduras, Ecuador Litoral, Ecuador Central, Dominican Republic and Colombia. We have trained two hundred (200) facilitators from seventy-five (75) congregations representing at least twenty-five (25) dioceses. These dioceses are doing or are ready to start hosting these small groups of formation and reflection across the Church.

This adult Christian formation program is not limited to this training. We also offer mentoring and accompaniment for each of the lay leaders who have received the training to serve as facilitators of the small groups discussions. During the training, we provide many tools for the facilitators to lead the small groups in their congregation.

The formation also includes the mentoring and accompaniment we offer to the facilitators. We have trained twelve (12) mentors to walk along with the new facilitators to answer questions, guide them and offer them support on their needs. There are many signs of what is happening in the congregations with the small groups, excitement, commitment and many people who have come closer and into a better relationship with God and The Episcopal Church.

MENTORING AND COACHING CLERGY WORKING IN LATINO MINISTRIES

The vision for the work of this subcommittee is that at the end the triennium: "We have an accessible network of coaches being used to support people working on Latino/Hispanic Ministry."

Resolution 2015-A086 called for a Church-wide Network of Partners to provide coaches and mentors who will work with congregations, lay leaders, clergy and diocesan staff.

The subcommittee decided that the best way to accomplish the vision for this work area was to recruit and train coaches utilizing a coach training institute with experience in working with Churches. The subcommittee also met with the D005 Church Planting Task Force to explore possibilities to work together, but it was decided that each group had unique needs and we decided to work independently.

The subcommittee started its work by identifying a culturally competent coach trainer, using among other criteria, the input provided by clergy already doing Latino/Hispanic ministry work, as well as the recommendations from other denominations that provide coaches for their clergy; such as the Presbyterian Church and the Evangelical Lutheran Church in America. Another consideration was to

determine our best option: a face-to-face weeklong training or online training. As the subcommittee contacted several coach training providers, it became clear that online training afforded us the opportunity to train more coaches than if we provided an intensive week-long in-person training. After some research, the subcommittee recommended CoachNet as the best provider to train clergy and laity as certified coaches. CoachNet would provide the training and the preparation for the new coaches to be certified by the International Coaching Federation (ICF).

With a training provider selected, the subcommittee set the goal to train thirty-one (31) trainers, based on the budget available. The first cohort of trainers started February 21, 2017, with nine (9) trainees. They are scheduled to complete their training by March 15, 2018. The second cohort of twenty-two (22) trainees will begin in April 2018, and should complete their training by March 2019.

The training consists of sixty-four (64) hours of coach training and ten (10) hours of Mentor Coaching. After four (4) months of training, the trainees begin to coach others, as they are required to attain one hundred (100) hours of coaching before they can take the certification test. By the end of the triennium the Church will have thirty-one (31) ICF certified coaches. These coaches will be available across the Church to assist clergy, Church planters, diocesan staff, seminarians and others in enhanced decision-making skills, greater interpersonal effectiveness and increased confidence.

Denise Trevino-Gómez, from the Episcopal Diocese of Texas said the following about her experience: "Learning new coaching approaches through CoachNet was instrumental in developing the necessary skills to help people think through their potential to reach their own personal and professional goals. The practical tips and tried and true methodologies of how to engage people as you guide them through sometimes challenging crossroads can be applied in so many church settings with individuals and whole groups. I am excited to be part of this initiative to grow new Hispanic ministries."

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

The vision for the work of this subcommittee is that at the end the triennium: "Many dioceses that understand this evangelistic opportunity to embrace Latino/Hispanics, also know that they need tools and training. Dioceses recognize that strengthening Latino/Hispanic Ministries strengthens the Church. We have marketing resources which are badly needed as well as sufficient Latino clergy, and prepared Anglo clergy and lay leaders to share in the ministry."

This subcommittee intends to accomplish its vision during the triennium through the following efforts:

- Develop the position of Associate Missioner for Latino/Hispanic Ministries and Program Development to oversee implementation of Resolution 2015-A086, and hire the Associate Missioner;

- Build on existing programs to create a comprehensive LHM congregational development plan;

- Develop and organize new LHM resources for congregational development;

- Assess the current activity and interest among Dioceses in order to focus resources; and

- Publicize LHM congregational development and redevelopment within the Episcopal Church.

Develop the position of Associate Missioner for Latino/Hispanic Ministries and Program Development to oversee LHM implementation of Resolution 2015-A086 and hire an Associate Missioner: in its meeting in November 2016, the Task Force recognized the need for additional staff support for the LHM office for implementing the activities of the Task Force.

The Task Force approved funding from its budget, and a job description was created. On April 16, 2017, the Rev. Samuel Borbón was hired as the Associate Missioner for Latino/Hispanic Ministries and Program Development. The new Associate's primary responsibility is to oversee the training for the Academia Ecuménica de Liderazgo, as well as the New Camino program, and the Mission Developer Training. In just seven (7) months Samuel has been invaluable in moving these programs forward as is evidenced in other parts of this report.

Build on existing programs to create a comprehensive LHM congregational development plan: the subcommittee started its work building on two existing LHM ministries: New Camino and the Mission Developer Training.

The subcommittee proposed to promote and present more New Camino conferences during the triennium. New Camino is a two (2) day program developed by the Office of LHM to encourage and equip Dioceses to start and support LHM. It has been held six (6) times to date. As of November 2017, the Dioceses of New York, Newark, Southern Virginia, Idaho and Northern California have participated in the New Camino conference, and four (4) dioceses have either scheduled New Camino (San Joaquin, March 2018; San Diego, May 2018), or are in the process of doing so (Chicago and Pennsylvania).

The Mission Developer Training is a program based on the Mission Developer work of the ELCA to prepare lay and ordained leaders to plant new churches and redevelop existing ones. The Office of Latino/Hispanic Ministries has adapted Lutheran materials, and has presented the training several times in recent years. Currently, the Mission Developer Trainings are being reassessed. In May 2017 members of the Task Force attended the Genesis training presented by the D005 Task Force and the Office of New Church Starts under the leadership of the Rev. Tom Brackett to see how this new program might be applicable to the goals and aims of LHM and other ethnic ministries. We are currently working with the Rev. Mike Michie, the new Staff Officer for Church Planting Infrastructure,

to develop a new mission developer training in Spanish in 2018, as well as one in English that would encompass the other ethnic ministries.

Canon Lucinda Ashby from the Episcopal Diocese of Idaho said: "The presenters at New Camino opened many hearts and minds to the richness and mutuality of ministry among our Latino brothers and sisters. People in our diocese refer to the New Camino retreat, even if they haven't yet found a way to engage in Latino Ministry, because of the breadth of the material presented. Because of New Camino, there are simple things emerging: welcoming signs, questions about La Virgen de Guadalupe and new conversations around DACA."

Develop and organize new LHM resources for congregational development: the main intent of these efforts is to promote participation in existing and new training programs developed by LHM under this Resolution: social media training, Digital Evangelism, provincial, Diocesan and ELCA training programs, transgenerational Latino ministries programs and Cultural Competency Training.

In addition to the promotion, through this effort, the Task Force intends to provide social media and evangelism resources: videos, memes, graphics/e-blasts and Facebook page improvements and resources, among others.

To date, these resources are all in the development process. The expected completion date is by December 31, 2017. By then, the LHM we will be equipped with an initial supply of:

1. Fifteen (15) Bilingual Graphics/E-blast templates (for events/occasions such as Las Posadas, Quinceañeras, etc.)

2. Twenty (20) Facebook Videos (short format series on topics like prayer, diversity, welcoming to the Episcopal Church, etc.)

3. Twenty-five (25) Memes (mix of Spanish, English and bilingual with a variety of themes like inclusion, the Gospel, etc.)

4. Facebook Audit, Strategy and Content Plan

Also, the current Latino Ministries Facebook page has had a thorough user interface audit and a strategic assessment has been completed. Currently, a draft plan is underway to maximize the page as an outward-facing LHM page, and to build a private group within the page for clergy/administration. A best practice review of Facebook by other churches is being conducted and ultimately, we will have a comprehensive strategy, content strategy, content (including ads and posts), as well as training the LHM team on engagement best practices. This is also expected to be completed by the end of December 2017.

Facebook videos were recently shot during gatherings of clergy and lay participants. Selections from the nine (9) plus hours of footage are being edited with an introduction and call to action to produce ten (10) English and ten (10) Spanish videos. The videos are in progress and will be presented to the LHM office with the goal of being completed by the end of December 2017.

Assess the current activity and interest among Dioceses in order to focus resources: the subcommittee has issued a survey on LHM across the Church which is expected to be completed by December 2017. Through this survey the subcommittee aims to determine what LHM already exist across dioceses, and where there is potential and interest for more.

The subcommittee also intends to gather information about all dioceses and individuals who have participated in both the New Camino and Mission Developer Trainings to provide follow through and continued support and offer new resources that have been developed.

Publicize LHM congregational development and redevelopment within the Episcopal Church: under this effort, the goal of the subcommittee is to create promotional materials for every major LHM ministry, to be shared within TEC. This includes Mission Developer Trainings, Nuevo Amanecer, New Camino, Nuevos Horizontes and the Academia Ecuménica.

CULTURAL-COMPETENCY TRAINING PROGRAM

The vision for the work of this subcommittee is that at the end the triennium: "Clergy and lay leaders have cultural competency training and are prepared to serve the Church in the future. We understand the question 'How does ministry work across generations of Latinos?'."

Combining academic learning with hands-on experience, the purpose of this multi-faceted intensive course is to provide cultural competency on the history, culture, socio-demographic, and religious aspects of the Latinos/Hispanics in the United States, and to provide the foundational tools necessary for Church leaders to discern and explore the type of Latino/Hispanic ministry that best fits a congregational setting and its context.

Participants from dioceses across the country who complete the Episcopal Latino Ministry Competency [ELMC] Training Course will:

- Show a familiarity with the general Latino culture and "religiosity" context of Latino worship and sacramental pastoral care.

- Learn to manage and address the worshiping needs of a dual language congregation, or to prepare for a special liturgical event involving English and Spanish speaking attendees.

- Acquire a fundamental competency in learning the general aspects of the pastoral and congregational ministries aimed at the immigrant and first generation, plus the ministry focused especially on the more acculturated and English-language speaking Latinos of the second and third generation.

- Define and interpret the broad historical and demographic profile of the Latino/Hispanic population in the United States through designated readings, course lectures, written reflections, class participation and experiential trips.

- Acquire first-hand knowledge of the Church in mission in the borderlands and identify the political, social and pastoral issues revolving around immigration from Mexico as well as Central and South America and the Caribbean. (Borderlands refers to either the US/Mexico border or immigrant entry points in urban centers.)

ELMC was offered in 2017 in Austin, TX at the Seminary of the Southwest (June 18-27, 2017 with 27 in attendance, and in Chicago, IL, at the Nicholas Center, St. James Commons, St. James Cathedral (October 15-24), with 26 in attendance.

ELMC is scheduled for 2018 in Claremont, CA, at Bloy House (June 11-18), and in Sewanee, TN, at the School of Theology (August 6-13).

Participants in the ELMC represent a wide variety of interests from across the Church coming from the following states: California, Washington, Kansas, Texas, Illinois, Indiana, Ohio, Tennessee, Virginia, North Carolina, New York, New Jersey, Pennsylvania, Massachusetts, and Ontario, Canada. The entire course in Austin was also simultaneously offered by live video streaming using Zoom video conferencing. In Chicago, the entire course was recorded and it is currently being edited, it will be available on the http://www.episcopaleslatinos.org/ website along with other educational and media resources that are easily accessible.

Both courses underwent evaluations by the participants as well as team members. Additionally, many of the participants were interviewed during the course to give us some immediate response to what they were experiencing and learning. The short videos were posted on Facebook, and have served as promotional resources.

We are grateful for the opportunity that has allowed us to meet face-to-face three times, hold over thirty (30) Zoom and other phone planning meetings, create the ELMC course, and offer it twice, in two (2) different cities. The benefits in terms of mission and goals is tremendous. The reception of the course has been extremely positive. The classroom aspects of the course, about one-half of the course are now a "package," and can be taken on the road with a minimal amount of additional planning.

The site-visits and interviews comprise the other one-half of each ELMC offering, and these are location sensitive, resulting in many planning hours required for the recruiting and logistics related to site-visits and interviews at a given city.

ELMC has been possible thanks to the support of the following team members:

- The Rev. Victor H. Conrado, Associate for Ministries, Diocese of Chicago; Associate Rector, St. Mark's, Glen Ellyn, IL, Diocese of Chicago; Adjunct Faculty Instructor, Bexley-Seabury Seminary;

- The Rev. Edward Gomez, Vicar, San Pablo/St. Paul's Houston, TX, Diocese of Texas;

- The Rev. Al Rodriguez, Adjunct Faculty Instructor and Interim Director of Latino/Hispanic Studies at Seminary of the Southwest, Diocese of Texas;

- The Rev. Ema Rosero-Nordalm, Deacon, Diocese of Massachusetts, Iglesia Nuevo Amanecer, ELCA, East Boston, MA;

- The Rev. Oscar A. Rozo, Priest-in-Charge, St. Mark's, Beaver Dam, WI, Diocese of Milwaukee; Church Planter/Priest-in-charge, Comunidad de Todos los Santos, Watertown, WI, Diocese of Milwaukee - ELCA South Central Synod of Wisconsin;

- Virginia Vagt, Vestry Member, St. Mark's, Glen Ellyn, IL, Diocese of Chicago

- Jaime Briceño, Digital Recruiter and Missioner, Bexley-Seabury Seminary; seminarian, Bexley-Seabury Seminary, Hyde Park, Chicago, IL

- The Rev. Canon Anthony Guillén, Episcopal Church Missioner for Latino/Hispanic Ministries; Diocese of Los Angeles.

EVALUATION

In the last year of the implementation of the efforts under this Resolution, the Task Force will contract with an independent evaluator to conduct an evaluation of programs and review the use of resources by means of quantitative and qualitative methods. The results of this evaluation will not only serve to demonstrate the extent of the accomplishment of the goals set by this Task Force, it will also include lessons learned and best practices that could serve as a guide for future efforts.

Budget

The financial report for the Task Force (below) is broken down by subcommittee, and it includes actual expenses for 2016, estimated expenses for 2017, and estimated expenses for 2018. In addition to the actual and estimated expenses for each subcommittee, the report includes travel and administrative expenses. The travel expenses are for the Task Force face-to-face meetings, and the administrative expenses include salary and benefits for the Associate Minister staff position proposed by the Task Force.

Budget

Work Area	Total 2016	Estimated 2017	Estimated 2018	Total Triennium
Network of Partners	$82,511	$66,942	$(963)	$148,490
Formation & Leadership Development	$47,333	$89,484	$66,965	$203,781
Mentoring & Coaching		$87,595	$3,358	$90,954
Congregational Development & Redevelopment	$57,550		$199,901	$257,450
Cultural Competency		$92,970	$75,030	$168,000
Task Force Evaluation		$6,250	$46,911	$53,161
Travel and Administration	$24,453	$ 83,303	$70,407	$178,164
TOTAL A086 Expenses	$211,847	$426,545	$461,609	$1,100,000

TASK FORCE ON CLERGY LEADERSHIP FORMATION IN SMALL CONGREGATIONS

Membership

The Rev. Dr. Susanna Singer, *Chair*	California, VIII	2018
Ms. Demi Prentiss, *Vice-Chair*	Dallas, VII	2018
Canon Thomas G. O'Brien, III, *Secretary*	Southeast Florida, IV	2018
The Rt. Rev. Scott Benhase	Georgia, IV	2018
The Rev. Robin Biffle	Spokane, VIII	2018
Ms. Ruth Frey	Washington, D.C., III	2018
The Rev. Maureen-Elizabeth Hagen	Oregon, VIII	2018
The Rev. Canon Gregory A. Jacobs	Newark, II	2018
The Rev. Dr. Trawin E. Malone	Texas, VII	2018
The Rev. Merry Chan Ong	California, VIII	2018
Ms. Mary Parmer	Texas, VIII	2018
The Rev. Canon Bradford Purdom	Ohio, V	2018
The Rt. Rev. Alan Scarfe	Iowa, VI	2018
The Rt. Rev. Robert Skirving	East Carolina, IV	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

CHANGES IN MEMBERSHIP

There was one change to the Task Force's membership during the triennium. The Ven. Paul Sneve resigned from the Task Force in September 2016 because his duties changed.

REPRESENTATION AT GENERAL CONVENTION

Bishop Scott Benhase and Canon Thomas G. O'Brien III, *Secretary*, are authorized to receive non-substantive amendments to this Report at General Convention.

Mandate

The Task Force was created by Resolution 2015-A045 which is excerpted below:

Resolved, the House of Bishops concurring, That the 78th General Convention authorize a task force with membership appointed by the Presiding Officers consisting of no fewer than ten (10) nor more than twenty (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.

Summary of Work

MEETINGS DURING THE TRIENNIUM

The Task Force met in person at the Maritime Institute in Linthicum Heights, MD from November 19, 2015 to November 21, 2015; at the Crown Plaza O'Hare Hotel in Chicago, IL from November 3, 2016 to November 5, 2016; and at the Red Lion Inn and Conference Center in Renton, WA from September 28 to September 30, 2017. The Task Force also held four (4) meetings of 1.5 hours each using Adobe Connect. These electronic meetings were held on April 20, 2016; September 14, 2016; February 1, 2017; and May 3, 2017. The Task Force expects to meet electronically in February 2018.

At each Adobe Connect meeting, the Task Force received oral reports from the chairs and members of the sub-committees that were established to develop information regarding each of the areas of concentration.

At its in-person meeting in September 2017, the Task Force reviewed and revised a draft of this Blue Book Report.

A PLAN FOR QUALITY FORMATION

The mandate for the Task Force was to develop a plan for quality formation for clergy in small congregations that is affordable, theologically reflective and innovative.

The Explanation to Resolution 2015-A045 defined a "small congregation" as one having an Average Sunday Attendance [ASA] of less than one hundred (100) persons. It noted that sixty-nine (69) percent of Episcopal congregations have an ASA of less than one hundred (100), and that the median ASA is sixty-one (61). The Task Force used this definition of "small congregation" in conducting its work.

To fulfill its mandate, the Task Force identified its areas of concentration, conducted substantial research, developed findings from that research, and is proposing six (6) resolutions.

The six (6) resolutions stated below constitute an integrated plan to improve clergy and lay

leadership formation for small congregations. Five (5) of the six (6) resolutions relate primarily to clergy formation. Because our findings showed that effective clergy in small congregations need strong lay leaders in those congregations, some of the resolutions concern the development of strong lay leaders.

AREAS OF CONCENTRATION

At the initial meeting in November 2015, the Task Force, in response to Resolution 2015-A045, decided to concentrate on research into the following specific areas during the triennium. Our goal has been to identify and understand the situation on the ground, in order to base our proposals on as much current data as possible:

1. Finding out what capacities and skills are perceived as most necessary for clergy and lay leaders in small congregations.

2. Exploring whether there is a means by which persons seeking ordination who intend to serve small congregations in non-stipendiary or bi-vocational positions can be financially supported in their formation programs. These programs may include local formation programs, long-distance learning with seminaries, and other forms of theological education. The goal is to encourage persons to seek ordination for non-stipendiary and bi-vocational positions without their having to incur substantial expense or debt.

3. Assessing different approaches needed to encourage under-represented populations to consider leadership in The Episcopal Church [TEC] as lay persons and as ordained persons.

4. Evaluating the potential for collaboration among local formation training programs and seminaries.

5. Exploring the usefulness of a central system or group of coordinated systems by which curated formation resources (written, audio, streamed, web-based) can be made available to congregations, dioceses, formation leaders and others.

6. Discerning the need for providing networking and resources to bishops, commissions on ministry, and local discernment committees to assist them in raising up clergy and lay leaders in their dioceses, particularly for small congregations.

RESEARCH PERFORMED BY THE TASK FORCE

To get a clear picture of the needs of TEC for the formation and training of clergy leaders for small congregations, the Task Force conducted an extensive online survey on formation of clergy and lay persons to which forty-eight (48) Bishops, thirty-eight (38) canons to the ordinary and thirty-one (31) chairs of commissions on ministry responded. Follow up interviews

were conducted with thirty-seven (37) persons. The Task Force also conducted extensive interviews with twenty-six (26) selected leaders involved in formation for ministry. The conversation partners were relatively diverse, and geographically and contextually representative.

The Task Force also conducted more general research, in order to understand current perspectives, thinking, and practices in TEC and beyond about clergy leadership formation for small congregations. Task Force members were diligent in seeking out and sharing articles, reports, position papers, and other documents with each other via the Extranet and the internet. Several Task Force members attended specific events that focused on areas of interest for the Task Force, notably the "Uncharted Waters" conference on diocesan schools hosted by the Diocese of Minnesota in June 2017.

The bishops on the Task Force brought a brief online follow-up survey to the September 2017 House of Bishops meeting to confirm that the directions taken by the Task Force were in accord with the bishops' understanding of the needs of TEC. The response of the forty-eight (48) responding bishops overwhelmingly confirmed the research findings and supported the elements of the plan developed by the Task Force.

The Task Force also received a $7,000 Roanridge Grant to be used to fund a consultant to convene several web-based conversations with groups of key formation leaders and decision-makers during January and February 2018.

FINDINGS OF THE RESEARCH REGARDING FORMATION GENERALLY
1. There is already a wealth of resources available for leadership formation for small congregations. Those resources are created and curated by large and small congregations and dioceses across The Episcopal Church, from many different cultural and theological orientations. The general lack of awareness of the existence of those resources, and the purposes they serve, demonstrates the need for a formation networking system.

2. There is a strong need to coordinate and disseminate existing resources and best practices throughout TEC in the areas of vocational discernment, ministry development, lay and clergy leadership formation, and congregational vitality. Where gaps exist, and as new contexts require new solutions, there is also a need for increased collaboration among those creating such resources and best practices. These resources are needed for congregations of all sizes, though small congregations and small dioceses have pressing and very specific needs.

3. Effective ministry in small (and larger) congregations always depends on collaboration between well-formed clergy and strong lay leaders. Based on our research, several of our recommendations address the need for robust discernment and formation for both clergy and

lay leadership so that small congregations, which constitute most of the congregations in TEC, may be most effectively served.

4. Bishops play an essential and growing role in directing and coordinating the formation of clergy and lay leaders in their dioceses. Their capacity to realize a diocesan vision and strategy for leadership formation is crucial to identifying and forming clergy and lay leadership, especially in small congregations in which non-stipendiary or bi-vocational clergy are often needed.

5. While many dioceses provide some training for commissions on ministry, the data shows that the need for small-congregation-specific training is perceived to be great, especially in flexible approaches to vocational discernment. Some excellent resources exist in individual dioceses, but general guidelines and best practices are not generally available throughout the dioceses of TEC. This is a felt need across TEC, and small dioceses with limited resources would particularly benefit from the coordination and dissemination of discernment resources and best practices.

6. There is limited availability of appropriate and culturally-sensitive vocational discernment and formation materials and strategies for clergy leaders called from ethnic minority communities. Key leaders from several of these communities expressed the need for flexible and culturally-differentiated approaches to discernment and formation. In these congregations, the role of the entire community (especially its elders) is critical not only in the initial discernment of clergy vocations in individuals, but for supporting candidates throughout the process of formation. There is also a clear need for greater availability of suitable formation resources in Spanish.

7. There are robust non-seminary programs for theological education and formation at the diocesan and regional levels. There is also an increased willingness on the part of some seminaries to create alternative accredited degree and certificate programs with flexible residence requirements. Some seminaries also collaborate with individual dioceses on local, non-accredited theological education and formation for clergy and lay leaders for small congregations.

8. Although there are some successful diocesan-seminary collaborations, the "silo effect" of separately incorporated seminaries and stand-alone diocesan formation programs works strongly against extensive collaboration or coordination across TEC.

9. Scholarship funding for non-traditional theological education and formation programs is scarce, and there are wide disparities in the ability of dioceses to support non-traditional education. Potential candidates for non-stipendiary and bi-vocational ministry in small

congregations need greater access to scholarship funds so that they are not burdened with substantial debt when they answer calls to ministries that provide little or no remuneration to them.

FINDINGS OF THE RESEARCH REGARDING SMALL CONGREGATIONS

1. Bishops report that fifty (50) to seventy (70) percent of their congregations are in the "small" category, mostly in small towns and rural settings. The Average Sunday Attendance [ASA] is mostly between twenty (20) and one hundred (100), with a substantial minority of congregations lower than twenty (20) ASA.

2. The principal demographic categories of the members of these congregations are middle class, mature adults, and elderly/retired persons, with secondary categories of those with fixed incomes or in the working class. Very few small congregations have many affluent or financially secure parishioners, and few have many young adults or families with children. The education level of the parishioners is generally college or high school. Very few have members with less than high school education or with post-graduate education. These congregations are overwhelmingly Anglo/White/Western, with some African-American and Latino/Hispanic (mostly bilingual) and very few others.

3. Small congregations and diocesan leaders say they need their clergy to be evangelists, change agents and mission focused leaders. What they say they most value are pastoral skills. Most do not recognize a need for intercultural and intergenerational competence.

4. Key Capacities and Skills seen as Crucial for Clergy Leaders in Small Congregations are:

- Deep spirituality focused on discipleship. Self-reflective, examined spiritual lives.
- Transparent, self-differentiated and a collaborative leadership style.
- True vocation to small congregational leadership and love of small communities.
- Strong relational, collaborative and networking skills; and the ability to use them both within the congregation and in the wider community.
- Deep commitment to raising up, training, supporting, and empowering lay leadership.
- Clear and compelling theology of mission and ministry and the ability to inspire others to embrace this.
- Evangelism and the ability to relate the Gospel to life.
- Teaching and mentoring skills.
- Capacity to discern collaboratively a shared new vision with a congregation, and to inspire the community of faith to embrace the changes needed to live it out.

5. Key Capacities and Skills seen as Crucial for Lay Leaders in Small Congregations are:

- Awareness of the dignity and worth of baptismal ministry, and the necessity of strong lay leadership in collaboration with ordained persons.

- Deep spiritual formation and strong faith, leading to lowered levels of anxiety and higher levels of hope.

- Clear, shared vision, discerned and embraced by the whole community of faith.

- Ability to connect faith to daily living.

- Strong awareness of the specific qualities, needs, challenges and gifts of the context in which they live and minister.

- Clear, transparent, healthy patterns of communication and interpersonal dynamics.

- Generosity and sense of abundance.

- Courage to try new things, flexibility and confidence.

6. An encouraging finding is that the same pastoral skills that have been so highly valued are also deeply relevant to present-day desired leadership skills, namely, collaboration, networking, teaching, mentoring, empowering, evangelizing and inspiring. This seems to indicate that a change in the focus and use of traditional clergy skills is needed, rather than the creation of an entirely new skill set.

Proposed Resolutions

RESOLUTION A022: CREATE A FORMATION NETWORKING TEAM

Resolved, the House of _____ concurring, That the 79th General Convention direct that a Formation Networking Team be established under the Office of the Presiding Bishop to serve as a networking referral hub for existing and specially-developed resources (online and otherwise) for the discernment of clergy and lay vocations, for clergy and lay formation, and for training clergy and lay leaders in matters such as evangelism, spiritual practices, discipleship, collaborative leadership, characteristics of small communities, relational and networking skills, raising up and empowering lay leadership, relating the Gospel to life, racial reconciliation, teaching and mentoring, and inspiring communities of faith; and be it further

Resolved, That the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $900,000 for the implementation of this resolution.

Explanation:

The findings of the Task Force consistently indicate that many dioceses, commissions on ministry, discernment committees and congregations find it difficult to identify and access suitable resources for training and guiding those responsible for vocational discernment and to identify and access effective resources for the formation and training of new clergy and lay leaders for small congregations.

To address these needs, the Task Force recommends that a Formation Networking Team be formed under the Office of the Presiding Bishop. The Formation Networking Team would be available by telephone and e-mail to individuals, Christian educators, clergy, commissions on ministry, discernment committees and congregations and dioceses that seek assistance in these areas. In due course, the Task Force expects that the Formation Networking Team would create a well-focused website of curated resources that allows users to evaluate the suitability of materials for their particular needs and contexts. In addition to making existing resources more readily available, the Formation Networking Team would help further collaboration by seeking to connect interested parties in the creation of new resources as necessary and helpful.

Questions regarding formation for ordination arise in a rapidly-changing landscape of programs and demands. The Formation Networking Team will enable timely responses to the pressing, time-sensitive needs of dioceses and congregations. A knowledgeable Team with a broad perspective of offerings across the Church will increase access to formation opportunities, especially for small congregations and dioceses.

Four (4) of the other resolutions proposed by the Task Force amplify the work that would be done by the Formation Networking Team.

The persons serving as the Formation Networking Team will need to be theologically trained so that they can properly evaluate resources which already exist in many forms and in many places. All members of the Formation Networking Team will need to be approachable and good listeners so they can direct persons to suitable resources. They will need to become familiar with the many resources currently available, and will need strong networking skills to promote sharing across the Church.

Having a Formation Networking Team will "level the playing field" so that congregations and dioceses with fewer financial and time resources can gain greater and faster access to what they need.

The members of the Formation Networking Team will need a small voluntary support committee to assist in evaluating and categorizing resources and making the Team aware of

developing needs across the Church.

RESOLUTION A023: ASSIST VOCATION DISCERNMENT GROUPS

Resolved, the House of _____ concurring, That the 79th General Convention, if a Formation Networking Team is created, direct the Team to collect, evaluate and encourage the sharing of excellent resources for the training of commissions on ministry and discernment committees for clergy and lay vocations and to publicize to The Episcopal Church, its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office in The Episcopal Church collect, evaluate and encourage the sharing of excellent resources for the training of commissions on ministry and discernment committees for clergy and lay vocations and publicize to The Episcopal Church, its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $60,000 for the implementation of this resolution.

Explanation:
While many dioceses provide some training for commissions on ministry, the data shows that the need for small-congregation-specific training is perceived to be great, especially in relation to flexible approaches to vocational discernment. Some excellent resources exist in individual dioceses, but guidelines and best practices are not generally shared among the dioceses of TEC. Small dioceses with limited resources would particularly benefit from the coordination and dissemination of resources and best practices.

Dissemination of best practices will also encourage commissions on ministry to address lay vocations as called for in Title III. Commissions on ministry need training in discerning and supporting lay vocations. Networking among dioceses will encourage sharing of best practices in this area.

RESOLUTION A024: FORMING CULTURALLY DIVERSE CLERGY

Resolved, the House of _____ concurring, That the 79th General Convention, if a Formation Networking Team is created, direct the Team to collect, evaluate, disseminate, and encourage the development of excellent resources and best practices for the discernment and formation of culturally diverse clergy, and to publicize to The Episcopal Church and its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if a Formation Networking Team is created, the Formation Networking Team work with other teams and established groups within The Episcopal Church to make available information to persons involved in culturally diverse ministries and Christian formation, and to seek feedback regarding resources needed (and used) by the widest possible variety of groups within the Church; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office in The Episcopal Church collect, evaluate, disseminate, and encourage the development of excellent resources and best practices for the discernment and formation of culturally diverse clergy, and to publicize to The Episcopal Church and its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if the Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office, work with other teams and established groups within The Episcopal Church to make available information to persons involved in culturally diverse ministries and Christian formation, and to seek feedback regarding resources needed (and used) by the widest possible variety of groups within the Church; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $60,000 for the implementation of this resolution.

Explanation:
Most institutions within The Episcopal Church are controlled by Anglo/Whites/Westerners. The fact that the Presiding Bishop is a person of color does not mean that there is still not substantial work to diversify leadership in The Episcopal Church.

There are significant cultural differences between (and within) racial and ethnic groups, and all of them have different histories with The Episcopal Church. Economic and class distinctions also present complicating issues.

All congregations and clergy should be encouraged to identify, recruit and mentor people of diverse racial, cultural and ethnic backgrounds who are discerning vocations to lay or ordained ministries. There is a specific need to train commissions on ministry in recognizing and dismantling barriers that traditional discernment processes present to aspirants for ordination who come from (and who may serve in) ethnic minority congregations or from congregations with a sizeable proportion of people of color. Culturally appropriate

approaches to theological educational are also needed in seminaries and other settings.

It is expected that the Formation Network Team would work closely with the Executive Council Committee on Anti-Racism and the Ethnic Ministries Department of TEC to make resources available to as many persons as possible.

RESOLUTION A025: BISHOPS AND SMALL-CONGREGATION CLERGY

Resolved, the House of _____ concurring, That the 79th General Convention, if a Formation Networking Team is created, direct the Team to offer to work with the House of Bishops to assist bishops by providing excellent resources and best practices in their work of identifying and forming clergy and lay leaders for small congregations in their dioceses; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct an appropriate body or office in The Episcopal Church to offer to work with the House of Bishops to assist bishops by providing excellent resources and best practices in their work of identifying and forming clergy and lay leaders for small congregations in their dioceses; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79ᵗʰ 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:
The bishop is always a key player in the identification and formation of clergy in the diocese and in shaping the attitudes in the diocese towards small congregations. Bishops indicated in their interviews and survey responses that resources to assist them in this task would be welcomed.

RESOLUTION A026: IDENTIFY EFFECTIVE FORMATION MODELS

Resolved, the House of _____ concurring, That, if a Formation Networking Team is created, the General Convention direct the Team to assemble and make available to dioceses a variety of effective models, both local and collaborative, for the formation of priests and deacons to serve in small congregations; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office in The Episcopal Church assemble and make available to dioceses a variety of effective models, both local and collaborative, for the formation of priests and deacons to serve in small congregations; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th 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:

The current landscape for clergy formation is complex. Many dioceses have developed local formation programs and schools. There are several non-accredited programs used by a variety of dioceses. Some seminaries have made significant changes in recent years in the way they deliver theological education in non-conventional ways (through low-residence programs and through collaboration with local formation programs). All these developments have strong potential to serve the needs of those preparing for ministry in small congregations.

Survey data indicates that bishops and commissions on ministry seek a variety of models for effective formation strategies. There is interest in how collaboration among seminaries and diocesan schools can be done effectively, since low-residency programs at seminaries are best used in close collaboration with diocesan programs. Dioceses increasingly seek flexible and adaptable approaches that meet the formational needs of a variety of aspirants. "Cross-order formation" for priests, deacons and laypersons, in which all orders study together at least part of the time, is increasingly seen as both possible and desirable.

RESOLUTION A027 NEW FUNDING FOR CLERGY FORMATION

Resolved, the House of _____ concurring, That the 79ᵗʰ General Convention direct the Executive Council to establish a committee of Executive Council with membership appointed by the Presiding Officers consisting of no fewer than ten (10) nor more than twenty (20) representatives. The committee shall include, but not be limited to, representatives from local diocesan clergy formation programs, representatives from seminaries (particularly persons involved in tuition assistance programs), fund development professionals within The Episcopal Church, and representatives from organizations (such as the Society for the Increase of Ministry and United Thank Offering) that provide funds to assist persons in advanced theological education. The committee shall be made up of bishops, priests, deacons, and laity. It shall develop and implement a plan to provide need-based central scholarship funding to individuals pursuing theological education who are preparing to serve as priests or deacons in non-stipendiary positions or in bi-vocational ministries in small congregations. This plan shall work to expand the funding available to aspiring priests and deacons who are engaged in theological education other than full-time seminary education. In addition to considering other funding sources, the committee shall examine the possible use of donor-directed endowment funds held in trust by the Domestic and Foreign Missionary Society [DFMS] as a partial means to fulfill this mandate.

Explanation:

There is little scholarship funding available to persons pursuing theological education other than in seminary M.Div. programs.

If a person seeking ordination intends to serve in a non-stipendiary position or in a bi-vocational ministry in a small congregation, a substantial impediment to pursuing this goal is the cost of obtaining the necessary education. Even the reduced cost of theological education in a non-residential setting or in a diocesan program can present a significant barrier to many potential clergy. Some for whom a costlier program might be most appropriate are prevented from pursuing that program because of financial constraints.

Moreover, funding theological education of any kind puts financial strain on many smaller dioceses. The Task Force perceives that creating a need-based, central scholarship fund is a justice issue. The fund would significantly level the playing field and enable access to a wider variety of educational resources by those who most need them.

The findings of the Task Force indicate that in the future, an increasing number of ordained ministers in The Episcopal Church will be non-stipendiary or bi-vocational. The data also shows that small congregations will depend more heavily on these clergy. To meet the need of small congregations for clergy and to avoid burdening these clergy with substantial debt, new strategies to provide funding for their theological education are needed.

TASK FORCE FOR LEVERAGING SOCIAL MEDIA FOR EVANGELISM

Members

Mr. Walker Adams, *Chair*	West Missouri, VII	2018
The Rt. Rev. W. Nicholas Knisely, SOSc, *Vice-Chair*	Rhode Island, I	2018
Mr. Benjamin P. Cowgill	North Carolina, IV	2018
The Rt. Rev. C. Andrew Doyle	Texas, VII	2018
Ms. Beth Felice	Missouri, V	2018
The Rev. Edgar Giraldo	Litoral Ecuador, IX	2018
The Rev. David T. Gortner, Ph.D.	Virginia, III	2018
Dr. Julie Lytle	Massachusetts, I	2018
Mrs. Andrea McKellar	South Carolina, IV	2018
Mx. Kori R. Pacyniak	Fort Worth, VII	2018
The Rev. Steven J. Pankey	Kentucky, IV	2018
Ms. Holli Powell, *Liaison of Executive Council*	Lexington, IV	
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	

CHANGES IN MEMBERSHIP

There were three (3) changes to the Task Force's membership during the triennium.

The Rev. Jake Dell was replaced by the Rev. Steven Pankey

Mr. Randall Curtis was replaced by Ms. Andrea McKellar

The Rev. Sara Shisler Goff was replaced by the Rev. David Gortner

Mandate

Resolution 2015-A172: *Resolved*, The House of Bishops concurring, That the 78th General Convention create a Task Force of three (3) bishops, three (3) presbyters or deacons and six (6) lay persons to develop two (2) curricula – one for clergy and one for lay people – for the purpose of leveraging social media for evangelism; and be it further

Resolved, That the Task Force develop the curricula in consultation with seminary deans, marketing professionals and others with knowledge of evangelism and social media; and be it further

Resolved, That the Task Force develop these curricula by the second year of the upcoming triennium and make them available by the third year, and that the Domestic and Foreign Missionary Society regularly evaluate the curricula to ensure they are current; and be it further

Resolved, That the Task Force work with the Development Office of the Domestic and Foreign Missionary Society to seek funds for this project, including the necessary staff or consultants to oversee this work.

Summary of Work

The task force began its work in November of 2015 wrestling with its mandate. What should the scope of a curriculum be? How do we define social media? How do we define evangelism? Does this small group even have the authority to define such a term for the whole church?

Guided by the motivation of the resolution author, the Rt. Rev. W. Nicholas Knisely, "to let people know the power of peace in their lives by an encounter with Jesus," the Task Force came to agree that our goal was to teach people to be evangelists and to use social media more effectively. This vision presumes that individuals and communities both understand their baptismal call as members of the Body of Christ to be witnesses to their faith in how they live their lives and to proclaim their faith by spreading the Good News in explicit ways. We determined that there should be one (1) curriculum that expresses how all the baptized are called to be evangelists and that reminds each member of the body that their role/position/function carries different responsibilities for determining how to appropriately express themselves online.

Five (5) learning outcomes emerged identifying that at the end of their participation in the curriculum, individuals and communities will be able to:
- Communicate via social media their experience of God's transforming love (empower digital storytellers),
- Communicate their personal/communal "why" for doing this work (theological foundations, social media theory, understanding of evangelism, ground in baptismal commitment),
- Identify, evaluate and appropriately use social media technologies (message, method, then media)
- Identify and set appropriate boundaries based on role/position/function (lay, church professional, clergy)
- Differentiate needs/methods for communication by generation (millennials, generation X, boomers)

We agreed that we wanted to produce a multimedia curriculum that included a glossary of terms, incorporated already available information from reputable sources like the Pew Internet and Social Life Center, and linked to current resources including social media policies already developed by dioceses and Church wide organizations. We hoped to design a highly adaptable program using print, podcasts, video productions and interactive modules that could be used as a series of shorter events like adult forums, a weekend retreat or through self-directed learning. We planned to tap familiar platforms as well as popular distribution networks.

Four subcommittees met to discuss identifying resources, finding funding, designing the curriculum, and writing a theology white paper. A short survey was drafted for later refinement; a timeline for curriculum development and testing at Church wide gatherings was developed; and a budget for presentation to the Executive Council was drafted before the Task Force adjourned.

It was decided that what was needed was a survey of the Church's relationship with social media and with evangelism; and that gathering such data would be a worthwhile task while Presiding Bishop Curry worked to create his new staff which would include a Canon for Racial Reconciliation and Evangelism.

The survey was distributed to the Church and yielded informative comments and data from the eight hundred (800) participants in English and forty-eight (48) in Spanish. It showed that while people are comfortable using social media platforms, they do not feel comfortable, authorized, or empowered to evangelize using these platforms. Many of the respondents noted a desire for a "how to craft my story" type guide or examples of the testimonies of others. Many commented about the need for being respectful of others space and a fear that they would be offending others by sharing their faith. Throughout the survey, a tension around what the word "evangelism" means developed. Is it "sharing one's story" or "spelling out systematic theology?" The survey confirmed for our group that while Episcopalians need technical help around the use of social media platforms, we first need to help the Church understand what evangelism is and isn't, and help people develop a comfort around what is a fearful subject for many.

After the survey, our work did not progress as quickly as our mandate intended. There were changes to the makeup of the Task Force and new Evangelism Office staff members were hired. Once the group was reconstituted, it divided into two (2) sub-groups, one to tackle the theology of evangelism and one group to form that work, alongside other materials, into a curriculum.

Curriculum Group
Mr. Walker Adams
Mr. Benjamin Cowgill
Ms. Beth Felice
The Rev. Edgar Giraldo
Dr. Julie Lytle
Ms. Andrea McKellar

Theology Group
The Rt. Rev. W. Nicholas Knisely
The Rt. Rev. C. Andrew Doyle
The Rev. David Gortner
Mx. Kori Pacyniak
The Rev. Steven Pankey

The Theology Group submitted a paper outlining the theological case for evangelism in a digital space (see Supplemental Materials). The Curriculum Group then held another in-person meeting in January 2016 to break down the theology into workable curriculum modules.

The committee designed eight (8) modules:

1. What is Evangelism?
2. Why Evangelism?
3. Permission Granted.
4. How to share stories.
5. What is Social Media?
6. Entering a Digital World.
7. How to share your story online.
8. How to use social media (Best Practices).

At the submission of this blue book report, the attached theology paper has helped shape some of the language being used by the evangelism team at the revivals being held around the Church. The curriculum group has taken the paper and other materials and shaped them together into a curriculum that is currently with The Episcopal Church's Office of Communications for editing and video production.

At the writing of this report, we have used little of our budget and those costs have gone to holding the two (2) face-to-face meetings, and interpretation services for our multilingual group. It is anticipated that most, if not all, of our remaining funds will be used by the evangelism staff on the production of video content to accompany the written curriculum.

The group would like to offer several comments to the convention and its leadership. First, we strongly encourage the convention to allocate more money for in person gatherings. While much work can be accomplished online, it is very hard to establish group dynamics that way. We found ourselves much more productive when we were physically gathered together and away from the distractions of our daily lives. This is especially true when multiple languages are being used in a committee.

Second, we encourage The Domestic and Foreign Missionary Society to explore other online meeting platforms besides Adobe Connect, with specific attention to VOIP. A number of our meetings ended up being canceled, significantly delayed, or were totally isolating to members of our group due to language and translation issues caused by the meeting platform. Our task force ultimately ended up abandoning Adobe Connect in favor of Zoom which freed a phone line for a translator to use for simultaneous translation.

Finally, we wish to thank the convention for the opportunity to work on this project. We are greatly

encouraged by the participation in our survey and acknowledge the Church's hunger for knowledge and tools for evangelism and living in the digital age. It has been a pleasure to work with the Presiding Bishop's staff in creating these materials.

Respectfully submitted,
Task Force for Leveraging Social Media for Evangelism

Proposed Resolutions

RESOLUTION A081: AN EPISCOPAL THEOLOGY OF EVANGELISM

Resolved, the House of _____ concurring, That the 79th General Convention commend to Provincial and Diocesan leadership the White Paper, "A Practical Theology of Episcopal Evangelism: Face-to-Face and in Cyberspace" written by the General Convention Task Force for Leveraging Social Media for Evangelism.

RESOLUTION A082: TRAINING FOR [DIGITAL] EVANGELISTS

Resolved, the House of _____ concurring, That the 79th General Convention convey to the Office of the Presiding Bishop's Canon for Evangelism and Racial Reconciliation the desire that the curriculum started by the General Convention Task Force for Leveraging Social Media for Evangelism be brought to its completion in this coming triennium; and be it further

Resolved, That said curriculum be utilized as part of The Episcopal Church's ongoing work of training evangelists, both face-to-face and digital evangelists, in preparation for Revivals and most especially in those places where a Revival may not be possible due to size, logistics, and other considerations so that [digital] evangelists are trained to share the Good News of Jesus Christ with traditionally underserved populations; and be it further

Resolved, That the Office of the Presiding Bishop's Canon for Evangelism and Racial Reconciliation explore the mutual benefit of developing relationships with para-Church organization such as Forma, the Episcopal Evangelism Society, and Episcopal Communicators to provide such training to other trainers whose reach might allow for the expansion of Episcopal Evangelists throughout the Church, with the goal of having a trained–, licensed [digital] evangelist in every Diocese by the end of the Triennium; and be it further

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $100,000 for the implementation of this resolution.

Supplemental Materials

A PRACTICAL THEOLOGY OF EPISCOPAL EVANGELISM: FACE-TO-FACE AND IN CYBERSPACE
Steve Pankey, Andy Doyle, David Gortner, Nick Knisely and Stephanie Spellers
Members of the Task Force on Leveraging Social Media for Evangelism

No matter the context: evangelism is evangelism. Our call to share the Good News does not go away when we log on to Facebook or Instagram. Whether we're sitting at dinner with a friend or streaming on Facebook Live, we have the opportunity to follow the Holy Spirit's invitation into a joyful, surprising adventure that changes us as much as it changes the people and communities we encounter. We are braving the wilderness, taking our faith into the public square, seeking the stirrings of the Holy Spirit, naming God's awakening presence, bearing and sharing our own stories of God's goodness, owning and offering God's great story, and blessing and joining with God's restoration project, already in progress.

The Holy Spirit has always moved out ahead of apostles in this way. The church in Jerusalem could not contain, plan or direct the movement of the living Word of God—it spread like running water, like trails of fire, through eddies and channels of relationships in homes and in the marketplace and across Roman society. That first wildfire of Pentecost in Acts 2 gives us a picture of the public square come alive, infused everywhere with new stories, ideas, passion and hope—fluid in movement, hopping across barriers of language and culture and class and group. So it is with us today. We cannot limit the Gospel to the walls of the Church or the work of the ordained. Every Christian everywhere bears this calling, to practice seeking where God is moving, celebrating God's stirring grace, and joining in God's work in that place and time.

Following that movement means we have to retire a few notions. Chief among them: the false dichotomy between face-to-face and online communication. After all, the Church's most important welcome mat may now be its website. Ask anyone raised in the era of Facebook and Instagram, and they'll tell you just how powerful, intimate, authentic and even holy their social-media mediated relationships can be. Some of us can hardly imagine genuinely sharing faith online, much less growing it, but God is constantly working God's purposes out in the world, and God will do it wherever people gather. The more we notice the thru-line that connects engaging in worship, walking about in daily life, having dinner with friends, or snapping and chatting on Snapchat, the more we can live into our vocation as good news-bearers in the world.

Together, members of the Task Force for Leveraging Social Media for Evangelism have spent more than a year surveying, studying and reflecting on just what it takes to help Episcopalians – or any people of faith – to embrace the World Wide Web as a mission frontier. People told us they need practical tools and intentional spaces for experiential learning. They also admitted they could use an

updated primer on just what is evangelism and how to practice it as faithful, humble, respectful Christians. This paper and the accompanying curriculum address those needs by exploring:

- A definition of Episcopal evangelism
- The link between technology and sharing faith
- Key principles for leveraging social media for evangelism

Is evangelism somehow different when you practice it in cyberspace? No. Has evangelism fundamentally changed from the core Christian ministry the apostles and ancients have handed down to us? No. But the world within which we live this calling is constantly changing. It's time to follow the God whose love and yearning knows no bounds and no limits.

Practical Theology of Evangelism

For Episcopalians today, evangelism is front and center. At the 78th General Convention in 2015, Presiding Bishop-Elect Michael Curry promised he would serve as our church's C.E.O.: the Chief Evangelism Officer. He knew he couldn't do it on his own; he shared a vision of a whole church freshly oriented toward the proclamation and embodiment of the good news of Jesus Christ. A Church firmly rooted in the baptismal promises to "seek and serve Christ in all persons, loving your neighbor as yourself" and "to proclaim by word and example the Good News of God in Christ." A Church that takes seriously the definition of our very reason for being, as detailed in the Outline of the Faith (also known as the Catechism):

Q: What is the mission of the Church?
A: The Church's mission is to restore all people to unity with God and each other through Christ.

We do not exist for ourselves. We exist for the sake of the movement Jesus launched some two (2) millennia ago, a movement to help the whole world to grow loving, liberating and life-giving relationships with God, with each other, and with creation.

What Evangelism Is …

Evangelism is one of the most important ministries in the life of The Jesus Movement, because this is where we focus on walking with our neighbors and communities as they develop their own loving, liberating, life-giving relationships with God. Over the years, Episcopalians have defined evangelism in various ways:

- **Scripture**: From *evangélion* (Greek): gospel, glad tidings or good news
The resurrected Jesus appears and the first words to his disciples are: "Go into all the world and proclaim the good news to the whole creation." Mark 16:15

- **Tradition**: Baptismal Covenant (Book of Common Prayer, 850)

Presider: "Will you proclaim by word and example the Good News of God in Christ?"
Candidate: "I will, with God's help."

-   **Standing Commission on Mission and Evangelism (2009):** "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."

Here is a practical definition collectively crafted by members of the Presiding Bishop's Evangelism Initiatives Team, the Task Force for Leveraging Social Media for Evangelism, and many other partners: **We seek, name, and celebrate Jesus' loving presence in the stories of all people – then invite everyone to MORE. #EpiscopalEvangelism**

Note the definition is the length of a tweet – that's not an accident. Of course there's plenty more to say about evangelism, but we also think evangelism is best practiced when it's attentive to the language and modes real people use to communicate.

Now, with that as our frame, let's unpack the tweet-length definition of Episcopal evangelism. "Episcopal evangelism: Seeking, naming, and celebrating God's goodness in stories from our lives and others' lives, and inviting people to MORE."

Episcopal evangelism. These two (2) words, for far too long, have not been seen together. But we as a Church are now moving beyond our long-term allergic reaction to the word "evangelism." Episcopal evangelism begins with our presumptive beliefs in the deep, fundamental goodness of God's creation and that God is already at work in every human life and in every setting. We do not go out as sole light-bearers to a world that only knows darkness. We go out always a hundred steps behind the Holy Spirit who is already moving in people's lives -- and so, we go out as light-seekers and light-discoverers, ready to seek and serve Christ in all people and to name where we see God's hand at work.

Episcopal evangelism is not some heavy-handed duty. It is not a tool, and it is not merely for use to get us more people as converts, Church members or pledging units. At its heart, Episcopal evangelism is a spiritual practice, at once active and receptive. When we do it, we embody the very life and practice of Jesus in the world (active). And we are filled with the Spirit and formed ever more into the likeness of Christ (receptive).

Episcopal evangelism is a joyful sharing of what you know to be good news and deep truth, and a celebration of how you see God at work in others' lives and in the world. It wells up from the experience of God's love poured out for us and into us, so much love it can't help but overflow from us in story and celebration.

This makes Episcopal evangelism quite different from some of the more unfortunate ideas that have attached to it over the years. For instance, we do not "measure" evangelism by outcomes. Evangelism does not mask an agenda devoted to Church growth, conversion or coercion. It speaks what we have seen and known as God's goodness. Our words of testimony are offered freely, like seeds on the ground. It is God who gives the growth.

Like prayer, evangelism is fundamentally a spiritual practice. It does not simply arise out of nowhere. It rises primarily from your own loving, liberating, life-giving relationship with God. "True evangelism emerges only out of your own trans-formation," David Gortner says in his book *Transforming Evangelism*. "Your message of hope, of abiding faith, of joy - your 'song of love unknown' - can only become natural, free, and open when you recall for yourself those moments of rescue, reorienting, awakening, and invigoration that are the result of God's work within and around you." (p. 2) In other words, evangelism is something that pours out of me because of God's love.

Seek. As Episcopalians, we promise in our Baptismal Covenant "to seek and serve Christ in all persons." This invites us to a great, unending adventure! What a gift -- to embark into the world around us listening and looking for Christ in every person. To listen for God present in others is a bold statement of faith, and fundamentally different from the posture of some Christians who go out assuming they are only meeting the absence of God. We dare to go out like sleuths, genuinely curious and assuming that we will find Christ, and that God has gone before us into all places and is at work in every life. Imagine saying to yourself in every encounter (face-to-face or in cyberspace!), "I am meeting Jesus the living Christ in this person": how does this change how you listen, look, and invite more in your encounter?

Seeking is an active approach. It is not merely passive listening. It is a way of listening and looking that is activated by a yearning to find the presence of the Holy Spirit -- a "holy curiosity." It is a habit of being attuned, tuning in to signs of God at work, wondering about others' lives, passions, longings, blessings, joys and sorrows. This means that seeking Christ in every person involves a constant choice: choosing to listen in a certain way. We meet others curious, even eager, to hear stories and expectant that God is moving in people's lives and hearts and actions all around us. Such attentive interest and eagerness to hear the good in people's lives is an act of evangelism even by itself -- think of what a gift it is to be so fully heard and seen.

Name. Nobody is a mind-reader. As many of us have said to our children as they learn how to communicate, we can now remind ourselves: "Use your words!" Evangelism is the telling of God's good news. It involves our words and all of our expressive powers. It means speaking.
We speak to name the Holy when we hear and see signs of the loving presence of Jesus. [1] We speak to point out to people where we see God at work in their lives. It can be so simple: "I hear God working through you in your story of how you and your family handled that situation." This is one of the great gifts of evangelism -- announcing God's goodness and presence in people's lives, and holding up a

mirror to let them know. Imagine it: if we do not name God as the one we see, people around us may never know.

Celebrate. What's not to celebrate when we see signs of God's goodness in our lives and the lives of others? Jesus invites us into loving, liberating, life-giving relationship with God, each other, and the whole creation. When we seek and find Christ in others and in our own lives, we find ourselves encouraged, grateful, surprised and delighted, like the widow in Jesus' parable who finds her lost coin and goes out saying "Rejoice with me!" (Luke 15:8-10). We celebrate good news, especially the good news of the presence of God in others.

It's important to distinguish this celebration from a naïve view of the world. Ask communities that have struggled – ask anyone who comes to faith through a liberation lens – and they will tell you that the most powerful reason to celebrate is because you've overcome something by the grace, power and abiding love of God. African-American spirituals celebrate a God who makes a way out of no way. Latin American liberation theologians speak of Jesus as the one who enters solidarity with anyone who has ever suffered, the savior who defeats death. We're celebrating the triumph of life, when the forces of this world made life seem impossible.

Jesus' loving presence. We are Trinitarian Christians: the Father has created us in love, the Son has redeemed us in love, the Holy Spirit sustains us in love. Lots of us feel hesitant talking about Jesus, perhaps because we're worried about stereotypes. We are *Christ*-ians, patterning our lives after the one who was and is God among us, revealing the truest and fullest incarnation of the Holy ever to grace the earth. In our evangelism, we invite people to discover more of life with him. Without Jesus, it's not evangelism.

Seeking, naming, and celebrating Jesus' loving presence is a spiritual practice of attentiveness and readiness to see and speak of the God who is love and who yearns to draw the whole world to Godself. That loving presence is found not only in the obvious joyful moments, but also in the difficult moments in people's lives. We recognize it through signs like what St. Paul calls the fruit of the Spirit: joy, peace, kindness, goodness, faithfulness, and self-control. We recognize the Holy One at work in those classic "cardinal virtues" of wisdom, commitment to justice, moderation and courage, and in resilience, determination, honesty, purpose, vigor and warmth. So, we can take note in our interactions and in our sharing of our own stories: If it doesn't feel like good news to you, and it doesn't sound like good news to the other person, it's not the "evangelion" - it's not evangelism.

Jesus' loving presence is something we acknowledge with our words. It also has to show up in us. We live as his body, his hands and feet in the world. Evangelist Carrie Boren Headington talks about three (3) central practices of evangelism, and one of them is social action and reconciliation. As she explains:

We are propelled by gratitude to share God's overflowing grace with the world around us, joining the way of Jesus in feeding the hungry, clothing the naked, sheltering the homeless, welcoming the stranger and breaking systems of injustice and systemic poverty. Our message gains its power and authenticity when we live it out, caring, loving, and fighting for the least of these -- and then clearly stating why we do what we do.

Our acts of social care, justice, and reconciliation witness powerfully to God's vision and calling for all humanity. Those acts gain more powerful witness when accompanied by words. Our words, our good news, in these situations are public witness to God's truth as good news. … Our public witness in these moments points to a higher vision that arises from our faith and from holy scripture.

Theologian Walter Brueggeman makes the connection, as well.

Evangelism is an invitation and summon to reinstate our talk and walk according to the reality of God, a reality not easily self-evident in our society. The call of the Gospel includes the negative assertion that the technological- therapeutic militaristic consumer world is false, not to be trusted or obeyed, and the positive claim that an alternative way in the world is legitimated by and appropriate to the new governance of God who is back in town.[2]

That's what the good news of Jesus' loving presence looks like. Episcopal evangelism welcomes people to be part of a Jesus Movement that's dedicated to partnering with God in the fulfillment of that loving, liberating and life-giving dream.

Stories. At the heart of our Christian faith is a story -- we might call it the Great Story, the collection of stories of God's creating, redeeming work found in scripture. The heart of the Great Story is in the stories of Jesus, but our lives and all lives become part of this Great Story. Every encounter with God yields a story. Every moment of gift and grace is a story of God's goodness.

What from the Bible and the Christian tradition do you treasure? Why? What do they reveal to you about God, and how do they speak to your own life? In our postmodern context, the Church often shrinks away from proclamation and focuses more on social action. We all too easily give a drink of water without speaking of Jesus Christ, the Living Water. Without proclamation, the Church becomes merely a social agency. As Headington reminds us, evangelism includes showing and telling about the Kingdom of God.

Know and embrace the Great Story. Also be eager to ask people for their stories. In people's stories, we hear God's movement. It is a gift to people to offer them an opportunity to tell their own stories, especially those stories of joy, gratitude, and wonder. And prepare to tell your story. Practice telling the stories of God's goodness in your own life -- tell them to yourself and to others. You could start

one of those gratitude journals Oprah Winfrey promotes. Learn and know the stories in your own life that speak of God's goodness.

It is ultimately in the interplay of these three (3) storylines -- God's story, your story, and my story -- that God's Word becomes clear, and so good news is fully heard. It is an amazing dance when we invite others' stories, share our own stories in response, and draw in portions of the Great Story that speak to the stories we have heard. Stories are at the heart of who we are. They are part of our identity. They define us, and they transform us.

Of all People. To grow evangelism as a spiritual practice, we need to begin as Episcopalians to grow our own capacity to seek, see, own and name God at work in all people. Let's begin with you. YOU are made in God's image, and you are a bearer of Christ. That means that your own stories are already full of God's presence -- in day-to-day experiences of your life, in the choices you make and the ways you choose to live and serve, and in moments of important change. As we tell these stories from our own lives more, we will find that our gratitude grows.

This capacity to see God's movement in our lives and to talk about it is what Headington calls "proclamation," the first of the central evangelism practices.

Stories of gratitude, wonder, and delight are infectious -- but only if shared. As Paul emphasized, "How are they to believe in one of whom they have never heard? And how are they to hear without someone to proclaim him? Blessed are the feet of those who bring good news" (Romans 10:14-15). At the heart of proclamation is testimony, speaking of what we have known, experienced, and seen directly. What are the stories that are testimony to God's movement in your life?

We can also see God's movement and the loving presence of Jesus in others. This requires a readiness to see a world shot through with God and helping others get a glimpse of what you see of God in them. Our offering of our own stories can open up stories from others, and we can meet others' stories with our own. This swapping of stories helps us hear and name the Holy in each other, and invite people to recognize God's holy ground.

Invite everyone to MORE. Evangelism is more than conversing, being a friend, listening or even walking alongside someone in their spiritual journey. Evangelism doesn't end with naming and celebrating Christ present in the stories shared. Sharing good news moves us toward inviting others to something more -- to a deeper encounter with Jesus, to following Jesus into fuller life-giving and liberating relationship with God, and to taking this journey with others who are part of the community of faith. Inviting is a joyous endeavor that arises naturally from the sharing of stories and the seeking and naming of Christ at work in another person's life -- to invite them to the great banquet of Jesus Christ and to the great adventure of following Jesus.

Lots of us would rather skip the invitation step. As Headington notes, invitation is one of the three (3) central practices of evangelism. In scripture, Jesus organizes his ministry around invitation: "Come, follow me." "Go and do likewise." "Come to my house." "Go and sin no more." "Stay with us, break bread with us." Even the very practice of evangelism is rooted in our acceptance of God's invitation to us. "God is the great evangelist," Headington says, "and yet God graciously allow us, Christ's Body, to be His ambassadors making His appeal through us (2 Corinthians 5:20)."

Our invitation cannot and must not treat people like projects or objects. In the moment, it may be natural to invite someone to more dialogue ("Could we meet again?"), more reflection (scripture, books, poems, videos or movies) or more Christian community (worship, outreach, study group, link to others with mutual interests). It could be the invitation to see more of God at work in themselves, in us and in the world.

When we invite others to something more, our invitation has to be accompanied from beginning to beyond end with hospitable welcome and mutual interest. There's no mystery to the invitation. We invite people to things that we already know are loving, liberating and life-giving. We don't invite people to things that are dull, disinterested, or divisive. Sometimes the adventure may lead to an invitation to church, to baptism, or to affirmation and blessing of a faith community that is already forming. Sometimes it will not. Our work is not to press the question, but to listen with deep interest and to invite others to ponder with us the possibilities of a God who intends on gathering every human being into God's loving embrace. Like naming the Holy, inviting to further discovery requires gentleness and wisdom along with courage.

If we are practicing evangelism well -- by seeking and sharing good news of Jesus' life-giving, loving, liberating presence -- we may not need to be the ones inviting. We may find others inviting us into action. In the conversation between Philip and the Ethiopian eunuch in the book of Acts, Philip doesn't do the inviting. At each stage, the Ethiopian eunuch invites Philip to lead him on the next step -- he even invites his own baptism!

Evangelism isn't something to dread. Episcopal evangelists are not selling Jesus or the Church, nor are we in charge of whether anyone follows Jesus. That movement belongs to the Holy Spirit. Still, the more we're in tune with the loving presence of Jesus, the more we're experiencing the fullness of a loving, liberating, and life-giving relationship with God, it wants to overflow. That overflow is evangelism.

The Gospel and Technology

Christian faith and technology have been synced up from the beginning. Some would argue that the Incarnation happened when it did in human history because the Roman Empire made it relatively safe to travel along roads and ride the seas in a thriving maritime industry. One could imagine the

Incarnation happened at the earliest moment that it was possible for the Gospel to spread with the fewest physical obstacles.

A close reading of Acts shows how dependent the early Church and the apostles were on the technology of their day. St. Paul is constantly journeying at sea – he and his companions survived a shipwreck (Acts 27) and were easily able to book passage on another ship to continue their voyage to Rome. Look at how many stories in Acts occur along Roman-built roads, from Philip's encounter with the Eunuch (Acts 8:26-40) to Paul's encounter with the risen Christ (Acts 9).

Technologies like roads and ships made it possible to form community, share news and notice others' lives in ways that weren't possible before. Written technologies did the same. The Church was an early adopter of the codex form of written communication, traditionally said to have been invented by Julius Caesar. The early Church readers preferred the codex to the scroll because it made it easier to look at the parallels between the Gospels or to see the connections between the Christian and Hebrew scriptures.

Likewise, it is hard to imagine the incendiary teachings of Martin Luther and other Reformers traveling very far without the nearly concurrent invention of the printing press. That technology allowed not only the dissemination of revolutionary writings, but put copies of the Bible, often in vernacular language, into the hands of laity. One of the most important reforms during the reign of King Henry VIII was the printing of the "Great Bible" and its distribution around England to parishes where it was authorized to be read during public worship. The Church found a technology that allowed it to share the Good News more effectively than it had previously, and it enthusiastically embraced it, despite the unintended consequences and subsequent controversies that the technology empowered.

In the 19th century, churches used new technologies for long ocean-going expeditions to bring the Gospel to far off continents – albeit with mixed consequences (especially from the view of the original inhabitants of the "discovered" lands). By the 20th century, we come to the modern era and a breathtaking series of advances in communications technology. Telegraphs and telephones were quickly adopted by church congregations and state and national structures as a tool to coordinate missionary work around the world. Movies were used to share the Gospel in ways intended to move the hearts and minds of audiences – for instance, consider the impact of (Episcopalian!) Cecile B. DeMille's *The Ten Commandments.*

The Church made use not just the movies themselves, but of the places where they were shown. The Crystal Cathedral in California had its origins in a drive-in theater that Robert Schuller and his wife Arvella used as they were planting a new church. The mega-church movement is dependent on and emerged in response to the shift in culture resulting from increasing use of cars. Television and radio were quickly used by preachers and congregations in many ways, supporting local congregations,

reaching national audiences for particularly compelling preachers, or sharing major worship events with people who would have no other way of participating.

And then there is the computer. I can't remember the last time I bought a printed edition of a biblical reference work or commentary set rather than purchasing an electronic version to add to my computer's library. The very nature of preaching has changed, from a direct preacher-to-parishioner auditory experience to a podcasted, time-shifted, multimedia presentation. Some congregations form online – like the Slate Project in Baltimore – and other virtual congregations never meet person to person, but have vibrant prayer and worship in online locations – whether in virtual reality, or simply by using a common web resource.

It's not all surprising then that the Church is thinking carefully about social media and the network effects that undergird it. The rise of Facebook, Twitter, Snapchat, Pinterest and whatever is coming next is all built on the recognition that information in a highly interconnected environment that is published by many to many. This is a far cry from the days when information was primarily published one to many or one to one. We're still at the beginnings of this particular communications revolution, but it should be clear that the Church is no stranger to learning to use and adapt technology for God's purposes.

Evangelism and Social Media
We are still learning about how to leverage social media for evangelism. But one thing we know: if we limit ourselves to one-directional communication – view static website here, send email there – we're missing the best part of social media *and* the heart of evangelism. As we noted in the section on Episcopal evangelism, this practice never succeeds merely by posting signs, painting front doors red, or creating destinations. The good news of God's abundant love spreads through the words of day-to-day conversation and through the actions tied to words of testimony and love by Christians in public life. Christians become more fully spiritually alive when they go public and find the living Christ who goes before us, ready to listen for and speak about and act in harmony with God's goodness in the warp and woof of their relationships and public life.

As you go forth to practice Episcopal evangelism, allow these three biblically-informed principles to ground you. Think of them almost as postures, a way of positioning yourself, especially in relation to social media.

Be prepared to be converted

I think … the missionary's job is to preach, not the church but Christ. If he preaches Christ and the message of Christianity, the church may well result, may well appear, but it might not be the church he had in mind. (Vincent J. Donovan, Christianity Rediscovered, 1978, Fides: Indiana, 810)

While this insight is nearly forty (40) years old, it seems especially true in the new context of social media and the world wide web. The world wide web is a new missionary context, a real place, and a world of relationships. The kind of Gospel sharing that takes place there is very real and the people to whom we are sent are very real. In fact, God is already at work using the forms of social media, search engines, and the like to link people to the Gospel. In order for us to leave our church homes and be missionaries in this context, we must first be converted from old ways of thinking and doing.

In Acts 10, we are told that a centurion by the name of Cornelius is already searching for God, seeking with the people of his household, to know God. He is a good man who gives generously to others and does good works. He isn't part of the church, but he prays to God. In the context of that prayer, God tells him to send for a man called Peter. Peter is utterly confused: Why would God send him to a Roman centurion? Does this man fear God? Why is he eating those unclean foods and welcoming people who have no part of Christian community? While Cornelius' faithfulness doesn't fit the mold of a good upstanding religious person in Peter's experience – God has made Cornelius and God is inviting Cornelius into community.

God works on Peter's heart. He eventually spends time with Cornelius, enters his home, eats his food, and his eyes open wide. "I truly understand that God shows no partiality, but in every nation anyone who fears him and does what is right is acceptable to him," Peter declares. He then bears witness to the Gospel, telling the Great Story of Jesus who preached peace, brought God's power of healing and release, was killed and yet rose again. While Peter is still speaking, the Holy Spirit comes down with power and might and blesses all who are there, Cornelius' household and Peter's cohort. Everyone is converted.

The work of evangelization and sharing the Good News of God's reconciling love in the context of the World Wide Web is going to look different than the Church many of us grew up with—in our verbal, face-to-face and virtual relationships, and in our action and testimony in the physical and virtual public square. If we do it well, the Gospel will be proclaimed to many people of every tribe and nation most of whom are different than ourselves. Many may be considered unclean or even unprepared for the Gospel. Many will more than likely ask questions that will make us uncomfortable and challenge our notions about what's good or holy or Christian. In the end, practicing the work of evangelism in the context of the internet and social media breaks downs stumbling blocks in our own experience of church. Not unlike Peter, it will break us down, change our hearts, go against our best manners and assumptions and in the end, will convert us.

As missionaries have rediscovered in every age, there is no fixed predetermined outcome in the work of evangelism. Just as has happened to faithful Christians who have crossed into unfamiliar cultures, through social media and the World Wide Web there is mutual transformation—of those seeking God, and those seeking to share God with others.

Be curious and open to follow
In Acts 8 we encounter the Ethiopian eunuch and Philip, one of the disciples. Philip is sent by God to go to a wilderness road, not so different from any of us apostles (the meaning of the word is "one who is sent") who have to set out to unfamiliar places and people. Philip goes and finds a eunuch we are told, who is a God-fearer and who is on his way home the Jerusalem temple. God tells Philip to go to him, and so he runs to catch up with the eunuch's chariot. Drawn by holy curiosity, he comes alongside this other person to discover what he is reading and studying.

It turns out the eunuch is reading Isaiah. Philip takes the opening: "Do you understand what you are reading?" From this point on, the Ethiopian eunuch is the one leading the conversation, opening each new doorway. "How can I understand, without someone to help me?" he says. Later, after Philip opens the scriptures with him, the eunuch asks, "Are these words of the prophet about himself or someone else?" And as they ride along, and the eunuch discovers his own desire for relationship with Jesus, he asks: "Look, here is water! What is to prevent me from being baptized, right here and now?"

At each point, Philip responds faithfully and fully, finding ways to say yes and keep going deeper on the journey as a companion. Philip is not leading, but he is consistently opening space—by being present, by being caring and curious, by keeping a non-defensive or aggressive posture and by offering interpretation that is simple and straightforward. Philip opens doors by approaching, asking the inquisitive first question, and moving unafraid with the flow of the conversation.

Consider this story from Acts as a mirror and example for what we do in our face-to-face and social media encounters. The eunuch represents for us this group of people who are searching and asking questions about the God they believe in. There are people all around us searching for God, for meaning, for communities of purpose, for ways to offer themselves to others. Many of them are searching the web and using social media to find out more about God, faith, or a community. We are invited to enter the work of social media and the web in the same way that we are invited to enter physical spaces around us more fully – to listen, to share the story, to welcome others' stories, to participate in what God is already doing in our midst.

Certainly, we can set up our own attractional websites, and this is good, but without entering wider conversations, it can also become another version of "red door evangelism" (as in, "Paint the door red, and the people will come.") Just as in our verbal and face-to-face interactions in daily life, the work of evangelism in social media is more diverse than posting an internet "sign" (website) or inviting people to visit a site. The deeper, richer, more complete evangelism involves our participating in conversations, discussions, and communities that are already present online and on the web—being who we are in Christ, immersing ourselves in the conversation, listening for and naming God at work, and inviting further and deeper connection.

Some of our family members, for example, are part of neighborhood groups online. Whenever anyone asks where to go to church, it launches a discussion about what they are looking for. Why not share stories from Episcopal communities? As other issues emerge online, why not show up and explore with people, noticing the parallels with scripture and the Christian tradition (important work in a culture of diminishing religious literacy)? From movies to news, we can speak a good word and a gospel word into these situations. Anyone can shout or paste angry hateful memes on Facebook. Share stories or invite people to consider how a TED talk impacts their spiritual life.

There are many other possibilities. But first, like Philip, it is most important to listen for the Spirit's bidding, then to approach, listen, and walk alongside people in context. Then, like Philip, we can enter conversation with curiosity and wait for others' responses to help guide us and to open doors.

Be expectant to see the Holy anew

What we are arguing for here is full dissolution of the false modern idea of a division between secular and profane space—whether between inside and outside the Church building, or between physical face-to-face presence and the web. We claim as Episcopalians that God is at work in the world and that all things are created by God. In fact, our creed says all things reflect the image of the divine Trinity – most especially the mysterious second person – God in Christ Jesus. If this is true, then everything can be a vessel for the Gospel and a bearer of Christ's presence.

One of the greatest hindrances to doing the work of evangelism through social media is that we very often believe and say that it is of no value—just as has been said over the ages about foreigners outside the culture, or eunuchs, or uncircumcised, or those who eat different foods or gather in different ways. Saints Cyril and Methodius crossed a division imposed by the Church of their age, daring to lead worship and write the words of scripture in Slavonic languages rather than expecting Slavs to learn Latin in order to hear the Gospel and to gather in faith. To say that anything in all of creation is of no value is to deny its connection to the God that created it. Instead of denying social media, embrace it and see how it could relate to the Gospel.

Paul teaches the master course in this practice. In Acts 17, we find him in Athens. He is walking through the town of Athens, and he sees it is filled with idols and false Gods. (Certainly this might be an apt description of the internet). Now consider this: a false god mimics God and may even have some of the attributes of God though is clearly not God. So Paul invites conversation with everyone who represents the many and various deities of that city, including the authorities of the city. And then he speaks …

> Athenians, I see how extremely religious you are in every way. For as I went through the city and looked carefully at the objects of your worship, I found among them an altar with the inscription, "To an unknown god." What therefore you worship as unknown, this I proclaim to you. The God who made the world and everything in it, he who is Lord of heaven and earth,

does not live in shrines made by human hands, nor is he served by human hands, as though he needed anything, since he himself gives to all mortals life and breath and all things. (Acts 17:22-25).

Paul bears witness and uses the local idols and the statue and temple to the unnamed God to proclaim the message of the Gospel. Not everyone is convinced. Not everyone will be convinced by our efforts either. However, he uses the symbols and cultural context to talk about God. What seems profane and unholy becomes a tool for opening up a vision of God.

Everything and everyone reflects the divine image, in big and small ways. The apostles' challenge is to seek a clear vision of how this reflects the nature and mission of God in Christ Jesus. In surprising ways, The Jesus Movement is already at work in the world around us. The question is, are we willing to go out and to see this even in the supposedly profane and unclean? The internet is a street filled with temples and idols and, like Athens, offers an opportunity for us to enter its confines and city walls, walk and discover, and then proclaim God's saving grace.

<p style="text-align:center">***</p>

Just as our forebears shared and celebrated the good news on the physical mission frontiers, so today the frontiers of web and media are contexts where light and life and hope are already available to move the whole world toward God.

Our hope is that you will discover this new place more fully. Enter and be yourself as you are in Christ. Treat each person as holy ground. Let yourself be open to speak from your faith. Invite continuing relationships. These hold true in our verbal conversations and face-to-face encounters. They are also true for our relationships through social media. Indeed, it may be that our practice of evangelistic presence, listening, and speaking through social media can carry us more deeply into a loving relationship with Jesus. Welcome to the adventure.

[1] For more on "naming the Holy," see Gortner, David *Transforming Evangelism* (New York: Church Publishing), 2008. P. 32, 44, 137-145.

[2] Quoted in *The Study of Evangelism: exploring a missional practice of the church* ed. Paul W. Chilcote and Laceye C. Warner (Eerdmans, 2008) p. 233.

TASK FORCE ON REVIEW OF PRESIDING BISHOP ELECTION AND TRANSITION PROCESS

Membership

The Rev. Anne Reed, *Chair*	Southern Ohio, V	2018
Mr. William Fleener, Jr., *Vice Chair*	Western Michigan, V	2018
The Rev. Canon Amy Real Coultas, *Secretary*	Kentucky, IV	2018
Ms. Alma Bell	Maryland, III	2018
The Rev. Robert Anton Franken	Colorado, VI	2018
The Rt. Rev. R. William Franklin	Rochester, XX	2018
Ms. Josephine Hicks	North Carolina, IV	2018
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2018
The Rt. Rev. Edward Konieczny	Oklahoma, VII	2018
Ms. Karen Longenecker	Rio Grande, VII	2018
Mr. Bill Robison	Milwaukee, V	2018
Ms. Judy Stark	Southwest Florida, IV	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	

Mandate

Resolution 2015 – B023 Review of the Presiding Bishop Election Process

1 *Resolved*, the House of Bishops concurring, That the 78th General Convention calls for a complete post-election review of the work of the Joint Nominating Committee for the Election of the Presiding Bishop including all aspects of the process including the work of the Transition Committee; and be it further

2 *Resolved*, That the committee to review the process be appointed by the Presiding Officers jointly, and such committee include representatives of all aspects of the process as well as some who have critical distance; and be it further

3 *Resolved*, That a report be given to the 79th General Convention of the committee's findings and recommendations for future elections; and be it further

4 *Resolved*, That the Office of Pastoral Development provide support for this work; and be it further

Summary of Work

INTRODUCTION

This Task Force was created by Resolution 2015-B023 at General Convention in 2015, with the purpose of a conducting a "complete post-election review of the work of the Joint Nominating Committee for the Election of the Presiding Bishop, including all aspects of the process and the work of the Transition Committee. We were required to give a report to the 79th General Convention of our findings and recommendations. The following pages comprise that report and those recommendations. We believe we have undertaken this work thoroughly and without a need to renew our tenure.

Members serving on this Task Force include Members of the Nominations Committee, the Transition Committee, TREC, Committee 19-A Legislative Committee of the House of Deputies that was to recommend confirmation of the election of the Presiding Bishop, an Episcopal elections consultant experienced in transition, leadership professionals and members from two (2) dioceses of nominees in 2015.

The B023 Task Force interviewed over forty (40) individuals and groups that had been involved in one or more aspects of the nomination, election, and transition process surrounding the 2015 election of the Presiding Bishop. We also conducted a survey. We received and reviewed three hundred and thirty-five (335) survey responses. Consistent themes emerged from the interviews and survey responses, from which have developed the recommendations outlined below.

Our survey gathered demographic data and asked respondents to assess the value of various aspects of the nomination and election process. A large majority of respondents engaged with the nominating committee's work through coverage by Episcopal News Service, the published "Profile," nominee videos and the presentation to General Convention.

The survey found that seventy-two (72) percent of respondents found the nomination process "meaningful" and seventy-eight (78) percent found the process "accessible." Respondents felt that the presentation of the nominees at General Convention (on June 24) was "effective" (89%) and "helpful" (89%) in their discernment and preparation for the election.

When asked what was particularly "life-giving" in the election of a new Presiding Bishop, several themes emerged: twenty-four (24) percent of respondents replied that the election of Michael Curry specifically was particularly life-giving; another twenty (20) percent named their participation in the process as what they found life-giving. Other highly valued aspects were: the June 24th presentation to General Convention (16%); rootedness in the Holy Spirit (12%); Eucharist and sermon with new Presiding Bishop (15%). Ten (10) percent of respondents said the nomination & election process itself was life-giving for them, though seven (7) percent reported that they found "nothing" in the election

was life-giving. Other observations and recommendations developed by our task force are outlined below.

- The process as currently designed is too lengthy and too expensive.

- The size of the nominating committee as currently mandated by Canon is too large and inefficient for the work and is expensive to support. (The size as currently mandated is twenty-nine (29) people: three (3) from each province and two (2) youth/young adults.)

- We recognize the importance of a diversity of voices and viewpoints on the committee, but we believe it can be effectively achieved with a smaller committee.

- The members of the Nominating Committee need certain skills and knowledge to carry out the tasks effectively.

- The budget for the nomination, election, transition, and installation should be realistic as well as cost-efficient, and should be planned and accrued for well in advance of the triennium in which the expenses will be incurred. There were no clear budgets in past years, and most recently a variety of sources had to be cobbled together to fund the entire process. It is essential to make a commitment to fund this process.

- To ensure a smooth transition between leaders (Presiding Bishops), it is important for the Presiding Bishop-elect to meet with key staff, including the retiring Presiding Bishop. Providing an organizational consultant to the Presiding Bishop-elect will maximize the opportunity for success in his/her leadership in relation to the staff and the organization.

- Pastoral support for candidates, nominees, spouses and staffs is an integral part of the process. The staff of the diocese sending the Presiding Bishop-elect has a particular need for a companion on their journey in the early days of the transition.

With those concerns in mind, we propose the following, some aspects of which are expressed in proposed revisions to Canons or Rules of Order attached hereto, and some which are expressed as recommendations:

NOMINATING COMMITTEE SIZE AND SELECTION
(Note: The *Task Force to Review Provinces agrees with these recommendations*)

A. Each General Convention shall elect a Joint Nominating Committee for the Election of the Presiding Bishop ("Nominating Committee").

B. The Nominating Committee shall be comprised of fifteen (15) members, consisting of five Bishops; five (5) clerical members, including at least one (1) deacon; and five (5) lay people.

   1. Clerical *(deacon or priest)* and lay membership on the Nominating Committee need not be limited to members of the House of Deputies.

C. The Joint Standing Committee on Nominations [JSCN] will nominate a slate for election to the Nominating Committee, in accordance with the JSCN's canonical charge and procedures, and guided by the skill sets needed for effective service on the Nominating Committee. (see attached list of skills needed for the tasks of the committee).

D. The House of Deputies shall elect the clerical and lay members of the Nominating Committee. The House of Bishops shall elect the Bishop members of the Nominating Committee.

Recommendations/comments:

An experienced Episcopal elections consultant would be a great asset to assist the Nominating Committee with its work. We recommend that the Presiding Officers engage such a consultant and that the budget for the nomination and election process include sufficient funds to pay for the consultant's fees and expenses.

NOMINATION AND ELECTION PROCESS

A. The Nominating Committee shall design a process to solicit and identify qualified nominees for the office of the Presiding Bishop. The process must enable the work to be done efficiently and as cost-effectively as practicable. This process shall be designed to encourage diversity that reflects the breadth of The Episcopal Church.

B. The Nominating Committee shall inform the wider Church of the process and timeline. (*Note - This is the current practice.*)

C. The Nominating Committee shall prepare a profile for the election of the next Presiding Bishop, and the profile will be distributed widely to the Church. (*Note - This is the current practice.*)

D. The Nominating Committee shall select a slate of not fewer than three (3) members of the House of Bishops as nominees for Presiding Bishop. The slate shall be announced publicly, and information about the nominees shall be made available to The Episcopal Church. (*Note – this is the current practice.*)

E. Following the publication of the slate of nominees, a petition period will open. Additional candidates may be nominated during the petition period, according to a process the Nominating Committee will design and implement. Any candidate identified through this

process must be vetted through the same process of background and reference checks as all nominees. (*Note – this is the current practice.*)

F. The Nominating Committee shall provide for pastoral care for the nominees, their families, and their diocesan staffs. (*Note – this is the current practice.*)

G. The Nominating Committee shall present to a Joint Session of the House of Deputies and House of Bishops the names of not fewer than three (3) members of the House of Bishops for consideration of the two (2) Houses in the choice of a Presiding Bishop. The only nominations accepted shall be names presented by the Nominations Committee, either through the naming of the original slate or through the Nomination Committee's designed petition process. At this or another Joint Session, there may be presentations from and/or questions to the nominees.

H. The election will be held at General Convention pursuant to existing Canons and the adopted Rules of Order.

    a. Pursuant to the Constitution and Canons and the Rules of Order for the House of Deputies, the Legislative Committee on the Confirmation of the Presiding Bishop will be formed during the triennium proceeding a convention in which an election for Presiding Bishop is to be held. The Committee shall make a recommendation to the House of Deputies whether to confirm or not confirm the choice of the Presiding Bishop-elect made by the House of Bishops.

    b. The Legislative Committee on the Confirmation of the Presiding Bishop shall be made up of eighteen (18) members, consisting of two (2) from each Province, one (1) lay and one (1) clergy. The committee shall be appointed by the President of the House of Deputies, who shall also appoint the committee chair.

    c. Members appointed to the committee who are found to be from the sending Diocese of one of the final candidates in the election process shall be asked to resign from the Committee by the President of the House of Deputies, who may fill the empty seat at his/her discretion. Committee members shall be informed of this policy prior to the announcement of the final nominees.

    d. The work of the committee shall begin prior to the start of General Convention, at the earliest opportunity following the publication of final nominees by the Joint Nominating Committee, such that members may arrive at convention well informed about the qualifications of each potential Presiding Bishop-elect.

    e. The recommendation of the committee regarding the confirmation of the election of the Presiding Bishop-elect will be made in the form of a resolution brought to the floor of the House of Deputies.

I. The Nominations Committee shall report its actions, expenditures, challenges, and recommendations to Executive Council within three (3) months after the election.

Recommendations/comments:

1. The Nominating Committee should plan its work carefully to streamline the work as best as possible, to avoid unnecessary expense, and to work within its budget.

2. One option to reduce the time and expense of the first screening of candidates is to limit that screening to review of written material. On-line interviews take a significant amount of time and energy for everyone involved and may not be necessary at this stage.

3. Another option is to allow the House of Bishops to develop a procedure by which the House of Bishops would screen the initial pool of candidates and narrow it to no more than eight (8) semi-finalists.

   a. Under this option, the House of Bishops would determine what information it needs to assist the House in narrowing the potential pool of candidates. This information may include personal written statements, resumes, written answers to essay questions, a question and answer session at a House of Bishops meeting, and discussions in the House about the profile and the gifts needed at this stage in the life of the Church for the next Presiding Bishop.

   b. The names of the semi-finalists should not be made known to the House of Bishops or to anyone other than the Nominating Committee (other than as needed to conduct background and reference checks). (*Note – Confidentiality of the names in the process at this point is the current practice.*)

   c. The House of Bishops would submit the names of the semi-finalists to the Nominating Committee, which would then develop and manage a process for identifying nominees from among the semi-finalists. (This may include submission of resumes, personal statements, answers to written questions, interviews, physical and psychiatric exams, reference and background checks. If written materials were prepared for the House of Bishops process of narrowing the potential pool to the semi-finalists, the semi-finalists may re-submit those materials to the Nominating Committee.)

4. The Nominating Committee may make materials available to candidates or semi-finalists to support their personal discernment, which may include The Episcopal Church budget, organizational charts of the Domestic and Foreign Missionary Society [DFMS] staff, General Convention Office, and The Episcopal Church; a preliminary draft of the Presiding Bishop's compensation package and other materials the candidates request or the Nominating Committee feels it is important for them to review.

5. In recent practice, the Nominating Committee has conducted a retreat with semi-finalists for deeper conversations, worship, and discernment. The sitting Presiding Bishop may be present

at this retreat to meet with the Nominating Committee and the semi-finalists to discuss his/her experience in the role, offer perspective, and answer questions from semi-finalists. (He/she should not participate in interviews, Q&A sessions or other aspects of the retreat.) (*Note –this recommendation is based on a common practice in many diocesan elections of the resigning bishop meeting with the candidates at a discernment retreat.*)

6. If the House of Bishops wants to hold a "walkabout"/presentation of the nominees in the House of Bishops, separate from and in addition to the presentation to the Joint Session at General Convention, then the House of Bishops may do so at a time and place and in a format of its choosing.

7. The Nominating Committee, working with the General Convention Office and Communications Office, plans election-day logistics and pastoral care for the nominees and their families. (*Note – this is the current practice.*)

8. Procedures should be carefully planned and meticulously enforced to avoid widespread publication of the election results in advance of communication to appropriate individuals, committees and the House of Deputies.

TRANSITION COMMITTEE PURPOSE AND COMPOSITION

A. Ensure communication of vital information to the Presiding Bishop-elect related to the role of Presiding Bishop in the areas of personnel, finance, and governance of DFMS, TEC, and the Anglican Communion, and to ensure the smooth transition to becoming the Presiding Bishop.

B. The Transition Committee should be an 'ad hoc' committee composed of eight (8) people appointed jointly by the presiding officers of House of Bishops and House of Deputies in the General Election prior to the election of the Presiding Bishop, to ensure a smooth transition to assuming the role of Presiding.

   1. The committee would be comprised of a diversity of orders, and most helpfully include the Canon to the outgoing PB, a finance person from Executive Council, a transition ministry specialist, two (2) representatives of the nominating committee, and a leadership development specialist.

   2. At the appropriate time a person may be appointed by the PB-elect.

TRANSITION COMMITTEE TASKS

A. Work within budget provided by The Episcopal Church [TEC].

B. Identify a short list of independent organizational consultant/leadership advisor firms and/or individuals from which the Presiding Bishop elect can choose. Funding for this specialist comes out of the Nomination/Transition budget.

C. Develop and communicate a transition plan for the Presiding Bishop-elect, including briefings and meetings with the current Presiding Bishop, Presiding Bishop-elect and key leaders.

D. Provide clarity regarding the current financial status and financial issues of TEC, including, where needed, an educational component and a clear understanding of discretionary and other funds.

E. Executive Council will establish a small committee (known as the Installation Committee), which will include a liaison from the Transition Committee [TC], for planning the liturgy for the Installation for the Presiding Bishop, and which will, in collaboration with the Presiding Bishop-elect, finalize the details of the liturgy to reflect his/her ministry. Appropriate members would be a representative from: TC, Presiding Bishop-elect, outgoing Presiding Bishop, venue and diocese of celebration.

F. Work with diocesan staff and leadership of the diocese from which the PB-elect is called (the 'sending diocese') to offer pastoral resources during their time of transition.

G. Continuing pastoral care started by the Nominating Committee, to the bishops not elected and their diocesan leadership (Standing Committee) of those not elected and to assure grief resources and re-entry resources are available and provided.

H. Offer pastoral support to the sitting PB to be used at his/her discretion regarding leaving office.

TIME LINE FOR TRANSITION COMMITTEE'S WORK

A. At least twelve (12) months prior to the election hold the first meeting and review the established budget and ensure appropriate funds are available for the transition and installation.

B. As soon as practical after the announcement of the nominees, the Transition Committee will:

1. Introduce themselves to the nominees and identify their role during the next several months.

2. Identify the independent organizational consultant/leadership advisor list – this is a confidential relationship with the Presiding Bishop-elect.

3. Share the list of consultants with nominees.

4. Invite nominees to consider which of these they would choose, or ask them to identify someone else.

5. Initiate contract with consultant in to be implemented upon the election.

6. Discuss resources available through the committee.

C. Upon election:

1. Establish a meeting date for Presiding Bishop-elect and spouse to visit New York City to ascertain living situation.

2. Presiding Bishop-elect meets with sitting Presiding Bishop.

3. Facilitate the execution of the contract with independent organizational consultant.

4. Independent organizational consultant/leadership advisor meets with Presiding Bishop-elect to provide pre-boarding guidance.

5. Reach out to 'sending' diocese to identify calendar needs of Presiding Bishop-elect and to communicate process by which expenses related to travel and other transition expenses of Presiding Bishop elect will be handled.

6. Reach out to bishops not elected, and diocesan staffs of those not elected to assure support; enable resources for reflection if needed.

D. Within first month post-election:

1. Identify calendar items that must be arranged within first three (3) months of assuming role.

2. Discern initial staff changes/additions that need to be put in place.

E. Not later than one (1) month prior to Presiding Bishop-elect taking office:

1. Ensure the <u>detailed</u> communication of the financial and personnel situation at DFMS and TEC.

2. Ensure sitting Presiding Bishop and Presiding Bishop-elect meet to discuss pastoral issues and key issues he/she will be addressing.

3. Identify immediate staff changes and assure Letters of Agreement for new staff.

F. Upon taking office:

1. Independent organizational consultant/leadership advisor meets with Presiding Bishop-elect to provide on-boarding guidance for the first ninety (90) days with a potential for on-going leadership advisory, should the Presiding Bishop choose.

G. Six (6) months after election:

1. Conclude work.

2. Report actions, challenges, expenditures and recommendations to Executive Council and file report for future General Convention.

BUDGET

PROPOSED BUDGET for B023 Task Force: Process for Nomination, Election, Transition and Installation of the Presiding Bishop

Nominating Committee (15)			
Meetings [5]	$144,000		Organize (17), Planning (20), Initial Screen (17), Discernment Retreat (25), Final Screen (17)
Search Consultant	$15,000		A search consultant to work with the Nominating Committee.
Interpretation	$7,000		Direct Cost only, 2 Interpreters travel included in each meeting count above
Psych Evaluation	$35,000		Psychiatric Evaluations for the finalists
Background Check	$4,000		Detailed background checks for the finalists
Candidate Travel	$8,000		Background Screening and Psych Eval Travel, Travel to Nominating Comm meetings is covered under meetings
Misc Expenses	$3,000		Miscellaneous Expenses and Committee's Contingency
Nomination Sub-Total		$216,000	
Transition Committee (8)			
Meetings [4 pre + 2 post]	$69,000		12mo prior (10), 6mo prior (10), 2mo prior (10), 1mo post (10) + meeting @ GC Post election (6) & Installation (6)
Leadership Advisor	$75,000		Professional advisor to pre-board and onboard PB elect from election through first 90 days
Interpretation	$5,000		Direct Cost only, 2 Interpreters travel included in each meeting count above
PB Elect Transitional Housing	$10,000		New York housing for PB elect once on the payroll but penthouse not yet available
Moving Expense	$30,000		Moving for both incoming and outgoing PB from Penthouse
Penthouse Upgrade	$3,000		Cleaning, minor repairs, and painting (as needed) to penthouse prior to move-in
Misc Expenses	$2,000		Miscellaneous Expenses and Committee's Contingency
Transition Sub-Total		$194,000	
Installation Committee (6)			
Meetings [3]	$9,000		3 one day meetings of the committee are estimated (6)
Equipment Rental	$3,000		For installation Service
Printing & Mailing	$3,000		For installation Service
Event Travel	$6,000		Travel for Nominating Committee
National Cathedral	$36,000		Direct cost of the National Cathedral or other facility used for the Installation Service
Interpretation	$8,000		Primarily for interpretation of Installation Service liturgy
Communication	$6,000		Direct cost to broadcast the Installation Service

Misc Expenses	$2,000		Miscellaneous Expenses and Committee's Contingency
Installation Sub-Total		$73,000	
Presiding Bishop's Office			
Travel for Guests	$15,000		Travel and accommodations aide for Ecumenical Guests
Meetings with Guests	$2,000		Social Gathering with International and Ecumenical guest the night prior to Installation Service
Presiding Bishop Sub-Total		$17,000	
Contingency		$15,000	Overall process contingency under oversight of General Convention Office
Triennium Total		$515,000	

NOTES:

1. **( ) represents the number of committee members or persons present at a given meeting, [ ] number of meetings.**
2. **Per person cost per meeting for Nomination and Transition Committees are calculated at $1500 per person per day (this is inclusive of airfare, lodging, meals, expense reimbursement & meeting room rental) as calculated by GC office.**
3. **Installation Committee meeting calculated at 1000/per person per day since meeting space will likely be less as will travel.**

RECOMMENDATIONS

A. The Standing Commission on Liturgy and Music structure the framework of a liturgy for the Celebration of a New Ministry and Induction of the Presiding Bishop, identify appropriate participants (roles of individuals, not specific people) during the triennium of 2018-2021. The liturgy needs to reflect the diversity richness and traditions of The Episcopal Church.

B. The budget for the Nomination, Election, Transition (e.g., travel as Presiding Bishop-elect) and Celebration of New Ministry/Induction of the Presiding Bishop be established no less than nine (9) years prior to the election, funded through the General Convention Budget process, and overseen by the Office of the General Convention; and that these resources be accrued over the nine (9) years. Recommend it be a canonical change to make sure this happens.

C. All costs related to participation of candidates for nomination, nominees and petition candidates for Presiding Bishop be budgeted for and borne by TEC through the General Convention budgeting process. (Note: this is the current practice)

D. Expenses incurred by the sending diocese to support the transition to Presiding Bishop (e.g., travel to meetings as PB-elect) be paid for by TEC.

E. The Presiding Bishop-elect is put on the DFMS payroll no later than one (1) month after his/her election.

F. Recommend to the Executive Committee of the Executive Council that a Letter of Agreement addressing compensation and other employment terms is developed and signed. (*Note: draft Letter of Agreement would be part of the material presented during the nomination process*).

G. An Installation Committee is responsible for the planning of the Celebration of New Ministration in collaboration with the Presiding Bishop-elect. Will facilitate the Celebration of the New Ministry and manage its related budget.

H. Recommend to the Executive Council that they choose the date and location of the Celebration of New Ministry/Installation for the Presiding Bishop within two (2) years prior to the election. We also recommend the location be suitable for a liturgical event that is open to as many members of TEC as possible.

Proposed Resolutions

RESOLUTION A172: AMEND CANON I.2.3

Resolved, the House of _____ concurring, that Canon I.2.3 is hereby amended to read as follows:

Sec. 3 (a) Upon the expiration of the term of office of the Presiding Bishop, *if the former Presiding Bishop has not attained the age necessary for full retirement as determined by the Church Pension Fund, he or she shall nonetheless be eligible for full retirement. The* ~~the~~ Bishop who is elected successor shall tender to the House of Bishops 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 House of Bishops, not later than six months thereafter

Explanation:
After serving a term as Presiding Bishop, the individual needs time to re-cast his/her ministry. Serving in this role is taxing on one's health and spiritual life. Discerning one's next steps in ministry takes time which is not afforded the incumbent. Additionally, it is difficult for a person who has been in the Presiding Bishop role to find a local jurisdiction or ministry that can provide adequate income, should the individual be several years away from receiving a pension. Offering full retirement benefits to the

outgoing Presiding Bishop can provide necessary income is a compassionate response to years of faithful leadership and service.

<div align="center">***</div>

RESOLUTIONS A173: AMEND CANON 1.2.1(A-F)

Resolved, the House of _____ concurring, that Canon1.2.1(a-f) is hereby amended to read as follows:

Sec. 1 (a) *At each General Convention a Joint Nominating Committee for the election of the Presiding Bishop shall be elected. The Nominating Committee shall be comprised of 15 members, consisting of five Bishops; five clerical members, including at least one deacon; and five lay people. The Joint Standing Committee on Nominations will nominate a slate for election to the Nominating Committee, in accordance with the Joint Standing Committee on Nominations' canonical charge and procedures, and guided by the skill sets needed for effective service on the Nominating Committee. The nominees for the Joint Standing Committee for the Nomination of the Presiding Bishop may but need not be deputies to General Convention. The House of Deputies shall elect five Clerical and five Lay Deputy as members of the Joint Nominating Committee for the Election of the Presiding Bishop, with a majority of those voting necessary for election.*

~~At each General Convention the House of Deputies shall elect one Clerical and one Lay Deputy from each Province as members of the Joint Nominating Committee for the Election of the Presiding Bishop. A Deputy from a particular Province may be nominated only by another Deputy from the same Province, but the election of each member of the Committee shall be by the entire membership of the House of Deputies, with a majority of those voting necessary for election. Prior to the election, the Clerical and Lay Deputies from each Province shall hold a caucus, at which two Clerical Deputies and two Lay Deputies as nominees shall be selected by the caucus, and these shall be the only nominees upon which the House of Deputies shall vote in electing the members of the Joint Nominating Committee. The President of the House of Deputies, after consultation with representatives of youth, shall appoint two persons, age 16-21, as members of the Joint Nominating Committee for the Election of the Presiding Bishop.~~

(b) *At each General Convention the House of Bishops shall elect five Bishops as members of the Joint Nominating Committee for the Election of the Presiding Bishop, guided by the skill sets needed for effective service on the Nominating Committee.*

~~At each General Convention the House of Bishops shall elect one Bishop from each Province as a member of the Joint 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 member of the Committee shall be by the entire membership of the House 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 two Bishops as nominees shall be selected by the caucus, and these shall be the only nominees upon which the House of Bishops shall vote in electing the members of the Joint Nominating Committee.~~

(c) In the event vacancies shall occur in the Joint 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 Joint Nominating Committee. In the event such vacancies shall occur more than one year prior to the next General Convention, the Presiding Officer of the House of Bishops shall appoint Bishops and the President of the House of Deputies shall appoint Clerical and Lay Deputies. in all cases from the same Provinces as those Bishops or 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 Joint 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 Joint Nominating Committee through the next succeeding General Convention. *A Lay member of the Committee who is ordained Presbyter or Deacon, or a Presbyter or Deacon who is consecrated a Bishop before the next General Convention, shall not thereby become ineligible to continue to serve on the Joint Nominating Committee through the next succeeding General Convention.*

(d) The Joint Nominating Committee shall remain in office until the adjournment of the next General Convention, at which a new Joint Nominating Committee shall be elected. Members of the Committee are eligible for reelection.

(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 *must enable the work to be done efficiently and as cost-effectively as practicable. This process shall be designed to encourage diversity that reflects the breadth of The Episcopal Church. The process shall include (1) the Nominating Committee shall inform the wider church of the process and timeline; (2) the Nominating Committee shall prepare a profile for the election of the next Presiding Bishop, and the profile will be distributed widely to the Church;   (3) 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; (4) establishing a timely process for any bishop or deputy to nominate any other member of the House of Bishops through a petition process, and for each Bishop so*

nominated to be vetted through the same process of background and reference checks as all nominees, and for each Bishop so nominated to be included in the information distributed about the nominees; and (5) providing pastoral care for each nominee bishop and his or her family and diocese.

New (f) *A Presiding Bishop Transition Committee shall be appointed by the Presiding Bishop and the President of the House of Deputies. The members shall have the necessary skills and talents to determine the need for and provide for transition assistance to the Presiding Bishop and the Presiding Bishop-elect.*

New (g) *A small Presiding Bishop Installation Committee shall be appointed by Executive Council with the necessary skills and talents to plan for and carry out a Celebration of New Ministry for the new Presiding Bishop.*

Formerly (g) New (h) At the General Convention at which a Presiding Bishop is to be elected, the Joint Nominating Committee shall present to the House of Bishops and the House of Deputies in Joint Session the names of not fewer than three members of the House of Bishops, *along with those nominated through the petition process,* for the consideration of the two Houses in the choice of a Presiding Bishop, *and there may be discussion of all nominees.* ~~At the Joint Session to which the Joint Nominating Committee shall report, any Bishop or Deputy may nominate any other member of the House of Bishops for the consideration of the two Houses in the choice of a Presiding Bishop, and there may be discussion of all nominees.~~ Commencing on the day following the Joint Session, election shall be by the House of Bishops from among such nominees. If the House of Bishops shall find itself unable to elect a Presiding Bishop from among such nominees, another Joint Session shall be held, at which additional nominations may be received, and on the following day, election shall be by the House of Bishops from among all of the nominees. After the election by the House of Bishops, report of the result thereof, including the number of votes cast for each nominee on each ballot, shall be made to the House of Deputies which shall vote to confirm or not to confirm such choice of Presiding Bishop.

The rest of the canon continues as numbered.

Explanation:

The Task Force for the Review of the Nomination, Election and Installation of the Presiding Bishop had the mandate to review the process of the last election and make recommendations to the General Convention. Overwhelmingly our research indicated that the Joint Nominating Committee was too large, and the process very costly. This canon revision attempts to address those considerations. The Task Force to Review Provinces concurs with the recommendation to remove Provinces as a source of individuals to serve on the Joint Nominating Committee.

Supplemental Materials

HISTORY OF ELECTIONS OF PRESIDING BISHOPS
B023 Addendum: Historical Background of Process for Nomination, Election, Transition and Installation of the Presiding Bishop

The recommendations offered by the Task Force on the Election and Installation of the Presiding Bishop are made mindful of the history of the Episcopal Church of selecting and installing its Presiding Bishop; the changing role, responsibilities and authority of the Presiding Bishop; and the impact of changes in the timing of General Convention.

For a Church as steeped in tradition as we are, it was instructive to discover, based on documentation from the Episcopal Church Archives, how brief the precedents are, if they exist at all. It is also illuminating to see that this Task Force is not the first group to recognize some of the challenges of this process.

As the attached Summary of Past Practices shows, committees and task forces over many decades have struggled with the same issues as the current Task Force, on such topics as:

* **Organization of committees** to preside over the election and transition

* **Identifying and documenting financial resources and expenditures**

* **Date, location and design of a formal liturgical event** to install the new Presiding Bishop (an event that did not even occur until 1947)

* **Assessing the process** and how it reflects our polity and the participation of the wider Church.

As the report from Archives shows, this Task Force is only the most recent group to take up these issues. It is our hope that, with the proposals, recommendations and resolutions we offer, we may be the last.

Part II: Summary of Past Practices to Mark the Installation of Presiding Bishops, 1804-2015

(1) There is **no evidence of formal installation or inaugural events** to mark the transition from one Presiding Bishop to the next during the 19th and early 20th centuries. In this period, the senior bishop acceded to the office upon the death of his predecessor. Notice of a new presiding bishop was reported factually in the Church press, sometimes as an additional note to the obituary on the passing bishop.

(2) Between 1919, when the election provision was adopted, and 1943, when the Presiding Bishop was required to release his diocesan jurisdiction, there were **only two (2) modest installations.** Rhode Island Bishop James DeWolf Perry's election was celebrated by a special service at the Cathedral in Providence in 1930. A "formal celebration of the induction" of Virginia Bishop Henry St. George Tucker in 1943 was hosted by the rector of St. Thomas Church, New York City. That ceremony was referred to as an "inauguration."

(3) Beginning with Presiding Bishop Sherrill in 1947, formal installations were held at the **Washington Cathedral, which was designated the seat of the Presiding Bishop in 1940.** In the case of the installation of Bishop Sherrill, the dean of the Washington Cathedral "compiled a highly appropriate service based on the best Anglican precedents of England and America" for the service, **based on the service for the installation of an archbishop of the Church of England.** Budget figures do not always appear in the budgets as line items, leaving one to infer that costs for the earlier installations were absorbed across existing budget categories.

(4) Beginning with Bishop Browning, the election was the result of a **Joint Nominating Committee.** The Committee was responsible for the pre-election preparation but did not extend to the post-election transition or installation activities except for their attendance at the installation. After Bishop Browning, funds for the installation could appear in both the corporate and canonical budget. The records for the Browning installation show that the Committee's budget could be adjusted after initial appropriations to accommodate the committee's involvement beyond the nomination process. **Due to the lack of documentation on actual expenses,** it is impossible to know what side events, particularly special dinners and receptions, were funded.

(5) After 1985, the **size and membership of installation planning committees varied over time.** Early committees appear to have been ad hoc combinations of staff from several centers of activity (home diocese, Cathedral, ECC). Some of the efforts were primarily led by Washington Cathedral staff (Allin, Griswold); some were coordinated by Church Center staff (Browning, Curry), some worked closely with representatives of the bishop's diocese (Browning, Jefferts Schori). These ad hoc installation committees were replaced in 2015 by a formal "transition committee" for the Curry installation.

(6) Documentation shows that **some of the coordinating groups, especially for the Browning and Griswold installations, were especially well organized** with much correspondence and lists for invitees, schedules, logistical arrangements, notebooks and logs, briefing notes, databases, task lists and the like.

(7) Two (2) attempts were made, in 2006 by Executive Council and in 2009 by the House of Bishops Committee on Pastoral Development, to study the election process as a whole, in terms of how it reflected the polity and participation. **Neither attempt moved forward.**

[Archives of the Episcopal Church Research Reports
 May 1, 2014, May 19, 2017]

RECOMMENDED CANONICAL CHANGES

CANON 2: Of the Presiding Bishop

Sec. 1 (a) At each General Convention a Joint Nominating Committee for the election of the Presiding Bishop shall be elected. The Nominating Committee shall be comprised of fifteen (15) members, consisting of five (5) Bishops; five (5) clerical members, including at least one (1) deacon; and five (5) lay people. The Joint Standing Committee on Nominations will nominate a slate for election to the Nominating Committee, in accordance with the Joint Standing Committee on Nominations' canonical charge and procedures, and guided by the skill sets needed for effective service on the Nominating Committee. The nominees for the Joint Standing Committee for the Nomination of the Presiding Bishop may but need not be deputies to General Convention. The House of Deputies shall elect five (5) Clerical and five Lay Deputy as members of the Joint Nominating Committee for the Election of the Presiding Bishop, with a majority of those voting necessary for election.

(b) At each General Convention the House of Bishops shall elect five (5) Bishops as members of the Joint Nominating Committee for the Election of the Presiding Bishop, guided by the skill sets needed for effective service on the Nominating Committee.

(c) In the event vacancies shall occur in the Joint 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 Joint Nominating Committee. In the event such vacancies shall occur more than one (1) year prior to the next General Convention, the Presiding Officer of the House of Bishops shall appoint Bishops and the President of the House of Deputies shall appoint Clerical and Lay Deputies. A Lay member of the Committee who is ordained Presbyter or Deacon, or a Presbyter or Deacon who is consecrated a Bishop before the next General Convention, shall not thereby become ineligible to continue to serve on the Joint Nominating Committee through the next succeeding General Convention.

(d) The Joint Nominating Committee shall remain in office until the adjournment of the next General Convention, at which a new Joint Nominating Committee shall be elected. Members of the Committee are eligible for reelection.

(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 must enable the work to be done efficiently and as cost-effectively as practicable. This process shall be designed to encourage diversity that reflects the breadth of The Episcopal Church. The process shall include (1) the Nominating Committee shall inform the wider Church of the process and timeline; (2) the Nominating Committee shall prepare a profile for the election of the next Presiding Bishop, and the profile will be distributed

widely to the Church;   (3) providing the names of not fewer than three (3) 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; (4) establishing a timely process for any bishop or deputy to nominate any other member of the House of Bishops through a petition process, and for each Bishop so nominated to be vetted through the same process of background and reference checks as all nominees, and for each Bishop so nominated to be included in the information distributed about the nominees; and (5) providing pastoral care for each nominee bishop and his or her family and diocese.

(f) A Presiding Bishop Transition Committee shall be appointed by the Presiding Bishop and the President of the House of Deputies. The members shall have the necessary skills and talents to determine the need for and provide for transition assistance to the Presiding Bishop and the Presiding Bishop-elect.

(g) A small Presiding Bishop Installation Committee shall be appointed by Executive Council with the necessary skills and talents to plan for and carry out a Celebration of New Ministry for the new Presiding Bishop.

(h) At the General Convention at which a Presiding Bishop is to be elected, the Joint Nominating Committee shall present to the House of Bishops and the House of Deputies in Joint Session the names of not fewer than three (3) members of the House of Bishops, along with those nominated through the petition process, for the consideration of the two (2) Houses in the choice of a Presiding Bishop, and there may be discussion of all nominees. Commencing on the day following the Joint Session, election shall be by the House of Bishops from among such nominees. If the House of Bishops shall find itself unable to elect a Presiding Bishop from among such nominees, another Joint Session shall be held, at which additional nominations may be received, and on the following day, election shall be by the House of Bishops from among all of the nominees. After the election by the House of Bishops, report of the result thereof, including the number of votes cast for each nominee on each ballot, shall be made to the House of Deputies which shall vote to confirm or not to confirm such choice of Presiding Bishop.

Canon 2 Section 3 on full retirement

Sec. 3 (a) Upon the expiration of the term of office of the Presiding Bishop, if the former Presiding Bishop has not attained the age necessary for full retirement as determined by the Church Pension Fund, he or she shall nonetheless be eligible for full retirement.

(b) Upon the expiration of the term of office of the Presiding Bishop, the Bishop who is elected successor shall tender to the House of Bishops 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 House of Bishops, not later than six months thereafter.

 (c) Such resignation shall be acted upon immediately by the House of Bishops.

TASK FORCE ON THE EPISCOPACY

Membership

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

CHANGES IN MEMBERSHIP

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

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

Mandate

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

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

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

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

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

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

Resolved, That the Task Force will work with the Office of Pastoral Development to develop best practices and educational materials to be published electronically and made publicly available, and may use some of its budget to retain consultants who will help with this task; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $150,000 for the implementation of this resolution.

Summary of Work

TABLE OF CONTENTS

I. INTRODUCTION

A. Executive Summary

I. Task Force Origins

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

II. The Roles and Responsibilities of Bishops

From its inception The Episcopal Church has affirmed the central role of bishops in its theology, leadership, and function. The purpose and function of a bishop is set forth in the Rite for the Ordination of a Bishop in the *Book of Common Prayer*: the people of the church choose bishops, a bishop "is called to be one with the apostles in proclaiming Christ's resurrection and interpreting the Gospel, and to testify to Christ's sovereignty as Lord of lords and King of kings." *Book of Common Prayer*, p. 517.

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

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

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

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

III. Diversity

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

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

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

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

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

IV. Missional Review and the Search and Election Processes

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

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

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

Background, Psychological, and Medical Screening

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

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

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

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

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

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

V. Formation for the Ministry of Bishops

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

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

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

VI. Other Canonical and Structural Considerations

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

B. Origins of the Task Force

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

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

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

C. Resolution 2015-D004

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

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

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

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

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

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

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

Resolved, That the Task Force will work with the Office of Pastoral Development to develop best practices and educational materials to be published electronically and made publicly available, and may use some of its budget to retain consultants who will help with this task; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $150,000 for the implementation of this resolution.

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

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

II. THE ROLES AND RESPONSIBILITIES OF BISHOPS

A. Missiology

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

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

First, the liturgy affirms that the people of the Church choose bishops, and that this affirmation is a holy trust. Then it describes the primary missiological work included in this sacred trust. A bishop "is called to be one with the apostles in proclaiming Christ's resurrection and interpreting the Gospel, and to testify to Christ's sovereignty as Lord of lords and King of kings." *Ibid* at p. 517.

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

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

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

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

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

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

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

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

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

Bishop as Chief Missionary

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

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

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

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

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

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

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

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

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

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

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

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

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

C. Gifts Needed for the 21st Century.

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

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

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

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

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

D. Discernment/Recruitment.

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

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

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

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

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

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

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

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

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

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

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

III. DIVERSITY

A. Current Demography

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

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

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

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

B. Reasons for Diversity

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

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

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

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

C. Fostering a Diverse Episcopate

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

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

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

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

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

1.   Recommendations for dioceses searching for a Bishop Diocesan

- Once the Bishop Diocesan has issued the call for the election of a successor, primary responsibility for emphasis on diversity falls to the Standing Committee of the electing diocese. Diversity must be an important consideration in the selection of the members of the search and transition committees. Consider factors such as gender, race/ethnicity, age, region, and experience in the diocese (both duration and kind).

- Generating a diverse slate of candidates begins with crafting the profile and recruitment processes. Before the profile is released, discuss methods for actively recruiting a diverse candidate pool. This may include publicizing the announcement in diverse outlets and actively encouraging women and members of racial and ethnic minorities to apply. The Standing Committee should communicate periodically with the diocese's search committee to reinforce the importance of supporting diversity throughout the entire process.

- Implicit biases can manifest by selectively highlighting the strengths (or weaknesses) of one candidate, while overlooking the same traits for another. Biases may also lead us to prefer candidates who are similar to ourselves on characteristics irrelevant to job performance, such as hometown or leisure activities (Rivera 2012). Establish on what dimensions candidates will be evaluated before looking at any applications and discuss how to weight different dimensions. Agreeing to a set of criteria in advance makes it harder for implicit bias to "seep through," as the group can refer back to the agreed-upon desired characteristics.

- "Blind" evaluations offer one way to reduce unconscious bias (Goldin and Rouse 2000). Consider screening candidates' written materials with information about location, race/ethnicity, gender, sexual orientation, age, and family status redacted. The Task Force understands that this is being done in a number of recent searches.

- Avoid requesting or otherwise soliciting information about marital/partnership and parenthood status. Search committees may be tempted to consider this information part of determining whether a candidate "has what it takes" to thrive in a demanding job, but information of this kind can disadvantage some candidates, particularly mothers (Correll, Benard, and Paik 2007).

- Women and racial and ethnic minorities are often represented among finalists in episcopal elections in similar proportion to their representation among applicants, but nonetheless underrepresented among elected candidates (Report of the House of Bishops Committee on Pastoral Development, "Reports to the 78th General Convention" (2015), Appendix: Report on 2013-14 Episcopal Elections – Resolution A144 (2012) Task Force on Women and Other Underrepresented Groups, pp. 59-63). This may reflect practices and beliefs of both electorates and search committees. On the electorate side, we recommend providing congregations with best practices in identifying and training representatives to the electing diocesan convention. These practices may include, among others: (1) demystifying the role to encourage a broader range of parishioners to consider serving; (2) providing potential representatives information about what will be expected of them, including attendance at walkabouts; (3) actively encouraging women, people of color, and members of other underrepresented groups to consider serving. On the search committee side, when women or racial/ethnic minority finalists are included only as "tokens" to fill out the slate (e.g., as a single alternative in a large pool, or late in the

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

- Dual-career couples, some but not all of whom are dual-call, are common in the Church. Consider providing and publicizing resources to support these couples, such as job-search support for the non-hire partner. Dual-career assistance may be particularly important in encouraging applications from women in different-sex partnerships who do not already reside in the diocese, as geographic moves by couples tend to privilege the male partner's career (Bielby and Bielby 1992; Sorenson and Dahl 2016).

- Report to the Church the demographic characteristics of applicants, finalists, and the elected bishop.

- The Diocese of Indianapolis implemented a process consistent with several of these suggestions in its 2015-2016 search for a Bishop Diocesan. See http://hoosierbishopxi.org/index.php/slate/process-timeline. The first African American female Bishop Diocesan in the Church was elected from this process.

2. Recommendations for dioceses not currently searching for a bishop

- Social accountability –having to explain how we came to the outcomes we did – tends to increase diversity (Dobbin and Kalev 2016). Collect and make publicly available aggregated (not individually identifiable) statistics about the characteristics of individuals who apply to and are selected for bishop and clergy positions, as well as characteristics of currently-serving deacons, priests and bishops. Evaluate whether women and members of racial and ethnic minorities tend to be placed in positions with similar pay, responsibility, and opportunities for advancement as their male and white peers. Regularly publish trends in these statistics over time. Appointing diversity managers or diversity task forces can help ensure accountability.

- Evaluate diocesan policies and processes that may unintentionally foster structural barriers to diversity. Failure to adopt policies such as Safeguarding God's People may send a message that a diocese will not take action when harassment is reported. Failure to provide proper implementation and training may reinforce pre-existing attitudes, such as that those who report harassment are "trouble makers" or that the perpetrators are "just making harmless jokes" (Dougherty and Goldstein Hode 2016).

- Search committees may look for candidates' experience leading large congregations. Women clergy face barriers to accumulating this experience. Newly ordained female clergy are less likely than their male counterparts to be employed as solo rectors (Church Pension Group Office of Research 2012). Among clergy serving as solo or head priest, women are underrepresented in larger parishes (Nesbitt 2015). Female clergy also

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

- Distribute to parishes in transition a set of best practices for encouraging a diverse search, modeled after the guidelines described above for dioceses searching for a bishop.

• Enlist men and white people as allies in the work of identifying and supporting talented women and people of color. In addition to recruitment efforts, mentoring programs offer a way to engage those in more privileged positions in the work of developing individuals at earlier career stages. Mentoring programs need not be limited to connecting individuals with similar characteristics; they can also connect individuals to mentors to whom they might not otherwise have access. Targeted recruitment programs and mentoring programs are both associated with increased organizational diversity (Dobbin and Kalev 2016).

• The policies and procedures governing the election itself, such as who votes and the vote thresholds for election, may affect the diversity of elected bishops. Dioceses not currently engaged in an election process may benefit from reviewing these policies with an eye to possible diversity implications.

• As more data are collected, evidence on policies and practices that facilitate diversity will improve. Practices that work well in one diocese may not translate to another. The Church can support dioceses by gathering and analyzing data to establish best practices and disseminate them to dioceses. Thus, diocesan policies should not be viewed as static, but will need to evolve in response to the diocese's own experiences and emerging Church wide evidence.

3. Church wide recommendations

• Invest in training Transition Consultants on practices that improve diversity, so that they can act as in-house experts on these matters for diocesan search committees.

• Provide financial resources to dioceses to support dual-call or other dual-career couples.

• Among other options, one form of mentoring program might allow those discerning a call to the episcopacy to explore this call in advance of entering a specific search (see Section II.D of this report).

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

Resolution A138: Transmission of Demographic Data from Episcopal Elections

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

Explanation:

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

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Resolution A139: Analysis of Data from Episcopal Elections

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

Explanation:

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

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Resolution A140: Diversity Guidelines for Episcopal Elections

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

Explanation:

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

<p style="text-align:center">***</p>

Resolution A141: Training of Transition Consultants

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

Explanation:

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

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Resolution A142: Adoption of Episcopal Election Procedures by Dioceses

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

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

Explanation:

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

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Resolution A143: Study Career Development of Female and Minority Clergy

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

Explanation:

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

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IV. SEARCH AND ELECTION PROCESSES

A. Missional Review

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

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

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

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

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

- Is the diocesan infrastructure capable of permitting people to exercise their ministries in healthy and life-giving ways? Is the staffing sufficient? Does it have the capacity to use its resources and potentially the resources of other dioceses?

- Are the staff (including the bishop(s)) compensated appropriately and in a timely manner?

- Is the diocese capable of fulfilling its financial obligations, including those in its own budget and its assessment to be paid to The Episcopal Church?

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

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

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

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

Resolution A144: Diocesan Missional Review

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

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

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

; and be it further

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

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

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

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B. Diocesan Discernment; Central Role of the Electing Diocese

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

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

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

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

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

- An outline of the procedure to be followed by the diocese in its search and election process beginning with the initial call for an election and ending with the ordination of the new bishop;

- Identify specific actions to be taken to

- Encourage a diverse applicant pool and follow a search and election process that reduces the likelihood of discrimination on the basis of race, ethnicity, or gender;

- Ensure that the process is transparent throughout the entire search and election process;

- Provide accountability for all involved in the search and election process;

- Require the collection of pertinent data for all persons being considered for nomination using the most current means available for background checks, financial information, and interviews of all bishops and transition officers having knowledge of a person being considered for nomination

Explanation:

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

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

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C. Extra-Diocesan Support from The Episcopal Church

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

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

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

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

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

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

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

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

CANON 12: Of the Life and Work of a Bishop

Sec. 1. Formation

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

Sec. 2. Continuing Education

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

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

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

The OPD Programs and Services

1. Best Practices and Other Materials
   a. Manual

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

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

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

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

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

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

- Best practices for transition process from announcement of transition to incorporation of newly elected bishop into diocesan system

- Resources that provide flexibility for use by both large and small dioceses

- Alternatives to minimize costs of transition process

- Ways to establish a transparent transition process with accountability

- Training for elected diocesan leaders/committee members involved in the transition process

- Suggestions for use of technology including secure internal communications among diocesan committees, secure communications with potential nominees, and secure sharing of reference and background check information

- Means for electronic and other background checks

- Suggestions for use of social media and websites for communicating search profile, status update, and election information

- Expanded reference check resources

- Most current medical and psychological testing

- Expanded background check resources including legal, financial, criminal, vehicular and civil information

- Interviews with current and former bishops with oversight of potential nominees

- Interviews with current and former diocesan Transition Ministers in ministry with potential nominees

- Encourage election procedures that allow time for adequate screening (e.g., discourage nominations from the floor)

- Transition Consultant services

- Discussion of election options/alternatives available to dioceses per canons

Explanation:

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

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c. Other Materials

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

2. Transition Consultants

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

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

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

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

3. Proposed Pilot Board for Episcopal Transitions

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

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

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

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

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

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

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

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

Resolution A147: Pilot Board for Episcopal Transitions

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

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

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

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

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

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

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

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

• formalizing and expanding recruitment and training for Transition Consultants;

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

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

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

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

• developing guidelines for reference, background, medical, and psychological screening of persons considered for nomination for episcopal elections and guidelines for the

dissemination, evaluation, and record keeping of the screening information gathered; and be it further

Resolved, That the pilot Board report semi-annually to the Executive Council and triennially to the General Convention; and be it further

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

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

Explanation:

The Resolution establishes the pilot Board of Episcopal Transitions to collaborate with the Office of Pastoral Development. The Board comprises persons from all orders of the Church's ministry. Through that collaboration, the Board will be responsible for revising existing resources and creating new resources to assist dioceses in the discernment, nomination, search, election, and transition processes for episcopal transitions; establishing a process and developing resources by which individuals may seek support in discerning a possible call to the episcopate; gathering and analyzing data regarding diversity in episcopal transitions, developing processes and resources to encourage diversity in the episcopate; recruiting, training and evaluating Transition Consultants and missional review consultants; and developing guidelines for reference, background, medical, and psychological screening of persons considered for nomination for episcopal elections and guidelines for the dissemination, evaluation, and record keeping of the screening information gathered.

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

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

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

- Consent process for election of bishops;

- Requirement of a psychiatric and medical examination after election by a person authorized by the Presiding Bishop utilizing forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund;

- Requirement that newly elected bishops participate in the process of formation authorized by the House of Bishops under Canons III.12.1 and III.12.2.

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

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

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

Background Screening

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

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

Psychological and Medical Screening

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

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

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

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

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

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

The Task Force recommends a new canon that would require:

1) Background screening of all persons appearing on the ballot for election to the office of bishop, prior to formal nomination (by whatever means of nomination, including by petition or "from the floor" of the electing convention), such background screening to include, at a minimum, federal and state criminal records checks, sex offender registry checks, credit checks, verification of education, ordination and employment history, review of all complaints, charges and allegations while an ordained person.

2) Requiring that all records of the screening (background, medical and psychological) of the person elected and ordained be maintained permanently by the electing Diocese with a duplicate record in the Archives of The Episcopal Church.

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

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

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

(c) *Prior to any person's name being placed on the ballot in nomination for election as a Bishop in a diocese, whether by the nominating body or by petition, floor nomination or in any other way, the diocese shall have:*
   (i) conducted a thorough background check of each nominee according to criteria established by the Standing Committee. Such background check to include but not be limited to criminal records, credit checks, reference checks, sex offender registry checks, verification of education, employment and ordination and review of all complaints, charges and allegations while an ordained person;
   (ii) each nominee evaluated by a licensed medical doctor approved by the Standing Committee;
   (iii) each nominee evaluated by a licensed psychologist approved by the Standing Committee, with psychiatric referral if desired or necessary;
   (iv) each nominee evaluated for substance, chemical and alcohol use and abuse whether as part of the medical examination, psychological examination or otherwise by professionals approved by the Standing Committee;

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

And be it further

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

Canon III.11.1(b)

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

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

(2) If either option in Sec. 1(b) is chosen, the *background checks and evaluations required by Canon III.11.x(y) shall be carried out by the special Joint Nominating Committee unless the Diocesan Convention has otherwise provided for the nominating process. The* evidence of the election shall be a certificate signed by the Presiding Officer of the electoral body and by its Secretary, with a testimonial signed by a constitutional majority of the body, in the form required in Canon III.11.3, which shall be sent to the Standing Committee of the Diocese on whose behalf the election was held. The Standing Committee shall thereupon proceed as set forth in Canon III.11.3

And be it further

Resolved, That Canon III.11.3 is hereby amended to read as follows:

Canon III.11.3

Sec. 3.
(a) The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some other person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese bearing a statement of receipt of:

(1) evidence of the Bishop-elect's having been duly ordered Deacon and Priest;

(2) certificates from a licensed medical doctor, and licensed ~~psychiatrist~~ *psychologist and substance abuse professional,* authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition *and for substance, chemical and alcohol use and abuse* and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and

(3) evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

And be it further

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

Canon III.11.9(c)

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

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

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

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

***

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

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

- What information is relevant to the search and election process;

- Who is equipped or should be equipped to evaluate the information;

- What information, if any, should automatically eliminate a person from further consideration in the process;

- What information, taken together with all other information, may contribute to a person being eliminated from further consideration in the process;

- If a person is included on the ballot, by the nominating body, by petition or from the floor, what information, if any, should be shared with the clergy and lay delegates electing the bishop;

- If a person is elected, what information, if any, should be shared with the Bishops of the Church and the Standing Committees who vote whether or not to consent to the election.

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

V. FORMATION FOR THE MINISTRY OF A BISHOP

A. The Ministry We Share.

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

B. The Ministry of Bishops.

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

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

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

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

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

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

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

C. What Bishops Need to Know, and When.

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

Major components of the current formation curriculum include:

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

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

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

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

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

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

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

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

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

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

D. Who Provides the Curriculum Content?

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

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

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

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

E. Governance of the College for Bishops

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

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

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

Resolved, The House of _____ concurring;

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

- the directors of the corporation be jointly nominated by the Presiding Bishop and President of the House of Deputies,

- the directors of the corporation be elected by the House of Bishops,

- the directors of the corporation be confirmed by the House of Deputies of the General Convention,

- that vacancies on the Board that occur more than six months prior to the convening of the next General Convention be filled by joint nomination of the Presiding Bishop and the President of the House of Deputies and election by the Board of the College, and

- that the President of the House of Deputies and the Presiding Bishop be members of the board of directors, ex officio.

Explanation:

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

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VI. OTHER CANONICAL AND STRUCTURAL CONSIDERATIONS

A. Introduction

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

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

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

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

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

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

B. Primary Role of Dioceses in Episcopal Elections

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

C. Clarification of Titles and Roles of Bishops

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

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

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

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

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

D. Assistant Bishops

1. Election and Tenure

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

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

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

2. Assistant Bishops from Jurisdictions Other than The Episcopal Church

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

E. Consent Process and Missional Review

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

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

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

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

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

F. Clarification of "Vacancy in the Episcopate"

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

G. Proposed Amendments to the Constitution

The Task Force recommends the following amendments to the Constitution:

Resolution A150: Amend Article I.2 of the Constitution

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

Article I

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

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

Explanation:

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

***

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

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

ARTICLE II

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

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

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

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

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

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

Explanation:

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

<div align="center">***</div>

Resolution A152: Amend Article III of the Constitution

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

ARTICLE III

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

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

Explanation:

The amendment corrects a typographical error.

***

Resolution A153: Amend Article IV of the Constitution

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

ARTICLE IV

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

Explanation:

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

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H. Proposed Amendments to the Canons

Resolution A154: Amend Canon I.13.3(a)

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

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

Explanation:

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

***

Resolution A155: Amend Canon III.5.1 (c)

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

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

Explanation:

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

***

Resolution A156: Amend Canon III.11.1

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

Sec. 1(a) Discernment of vocation to be a Bishop occurs through a process of election in accordance with the rules prescribed by the Convention of the Diocese and pursuant to the provisions of the Constitution and Canons of this Church**.**

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

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

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

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

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

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

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

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

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

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

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

Explanation:

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

<center>***</center>

Resolution A157: Amend Canon III.11.2

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

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

Explanation:

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

<center>***</center>

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

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

Sec. 3 (a) The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

(1) evidence of the Bishop-elect's having been duly ordered Deacon and Priest, *and if a Priest, is a Priest in good standing of this Church*;

Explanation:

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

***

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

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

Sec. 3 (a) (third paragraph)

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

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

Explanation:

The amendments shorten the period for obtaining consents to the ordination of a bishop-elect from 120 days to 60 days.

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Resolution A160: Amend Canon III.11.9(a)

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

Sec. 9. Other Bishops

(a) Bishops Coadjutor

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

Explanation:

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

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Resolution A161: Amend Canon III.11.9(b)

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

(b) Bishops Suffragan

(1) If a Diocese discerns a need for another Bishop due to the extent of diocesan work, the Diocese may elect a Bishop Suffragan in accordance with *Canon III.11.1* and this Canon *III.11.9(b).*

(2) Before the election of a Bishop Suffragan in a Diocese, the consent of a majority of the Bishops exercising jurisdiction and of the several Standing Committees must be obtained.

(3) (i) *(2)(i)* A Bishop Suffragan shall act as an assistant to and under the direction of the Bishop Diocesan.

(ii) Before the election of a Bishop Suffragan in a Diocese, the Bishop Diocesan shall submit a consent with a description of the role and the duties of the Bishop Suffragan to the Convention of the Diocese.

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

(5) *(4)* No Bishop Suffragan, while acting as such, shall be Rector, but may serve as Member of the Clergy in charge of a Congregation.

Explanation:

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

<p style="text-align:center">***</p>

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

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

(c) Missionary Bishops

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

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

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

Explanation:

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

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

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

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

Explanation:

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

***

Resolution A164: Amend Canon III.12.2

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

Sec. 2. Continuing Education

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

Explanation:

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

<p style="text-align:center">***</p>

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

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

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

Explanation:

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

<p style="text-align:center">***</p>

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

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

Section 4. Residency; *Vacancy in the Episcopate*

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

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

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

Explanation:

The amendment clarifies when a vacancy in the episcopate occurs.

<div align="center">***</div>

Resolution A167: Amend Canon III.12.5

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

Sec. 5. Assistant Bishops

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

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

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

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

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

(i) have previously resigned their former responsibilities;

(ii) have received approval, by a competent authority within the Church of their ordination ~~of their appointment to the position of Assistant Bishop~~ *as a Bishop of that Church*;

(iii) have exhibited satisfactory evidence of moral and godly character and having met theological requirements;

(iv) have promised in a writing submitted to the Bishop *Diocesan* ~~making the appointment~~ to submit in all things to the Doctrine, Discipline and Worship of this Church;

(v) have submitted to and satisfactorily passed a thorough examination covering their medical, psychological and psychiatric condition by recognized and licensed professionals appointed by the Ecclesiastical Authority of the Diocese with the approval of the Presiding Bishop. The forms for medical, psychological and psychiatric reports prepared by The Church Pension Fund shall be used for these purposes.

(vi) have undergone background screening and, if feasible, background checks as provided in Canon III.11x [per Section IV.C.4 of this Report].

(vii) have been examined by the Bishop Diocesan and at least one other Bishop as to knowledge of this Church, its worship and governance:

> *(1) Church History: the history of the Anglican Communion and the Episcopal Church.*

> *(2) Doctrine: the Church's teaching as set forth in the Creeds and in An Outline of the Faith, commonly called the Catechism.*

> *(3) Liturgics: the principles and history of Anglican worship; the contents of the Book of Common Prayer.*

> *(4) Practical Theology:*

>> *(i) The office and work of a Deacon and Priest in this Church.*

>> *(ii) The conduct of public worship.*

>> *(iii) The Constitution and Canons of the Episcopal Church and of the Diocese in which the applicant is resident.*

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

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

(i) have received the following training:

(1) prevention of sexual misconduct.

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

(3) the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

(4) training regarding the Church's teaching on racism.

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

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

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

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

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

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

Explanation:

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

***

Resolution A168: Amend Canon III.12.9(a)

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

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

Explanation:

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

***

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

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

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

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

Explanation:

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

***

Resolution A170: Amend Canon III.12.12(a)

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

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

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

Explanation:

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

***

Resolution A171: Amend Canon III.13

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

CANON 13: Of Dioceses without Bishops

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

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

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

Explanation:

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

***

Proposed Resolutions

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

Resolution A138: Transmission of Demographic Data from Episcopal Elections

Resolution A139: Analysis of Data from Episcopal Elections

Resolution A140: Diversity Guidelines for Episcopal Elections

Resolution A141: Training of Transition Consultants

Resolution A142: Adoption of Episcopal Election Procedures by Dioceses

Resolution A143: Study Career Development of Female and Minority Clergy

Resolution A144: Diocesan Missional Review

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

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

Resolution A147: Pilot Board for Episcopal Transitions

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

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

Resolution A150: Amend Article I.2 of the Constitution

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

Resolution A152: Amend Article III of the Constitution

Resolution A153: Amend Article IV of the Constitution

Resolution A154: Amend Canon I.13.3(a)

Resolution A155: Amend Canon III.5(c)

Resolution A156: Amend Canon III.11.1

Resolution A157: Amend Canon III.11.2

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

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

Resolution A160: Amend Canon III.11.9(a)

Budget

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

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

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

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

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

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

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

Continuance Recommendation

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

Supplementary Materials

A. CHART OF TITLES AND TYPES OF BISHOPS

Types of Bishops

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

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TASK FORCE ON THE EPISCOPAL CHURCH IN CUBA

Members

The Rev. Dr. Luis León, *Chair*	Washington, D.C., III	2018
Ms. Martha B. Alexander	North Carolina, IV	2018
The Rev. Canon Lucinda Ashby	Idaho, VIII	2018
Ms. Grecia Christian Reynoso	Dominican Republic, IX	2018
Mr. Yorki Encalada Egúsquiza, *Secretary*	Ohio, V	2018
The Rt. Rev. Leopold Frade	Southeast Florida, IV	2018
Mr. Romualdo "Romi" Gonzalez, Esq.	Louisiana, IV	2018
The Rev. Mark B. Pendleton	New Hampshire, I	2018
The Honorable Byron Rushing	Massachusetts, I	2018
Ms. Linda E. Watt, Member	Utah, VIII	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

INVITED GUESTS

The Episcopal Church in Cuba [ECC]: Bishop Griselda Delgado, Dean José Angel Gutierrez, The Rev. Halbert Santana and Treasurer José Raúl Ortiz

The Anglican Church in Canada [ACC]: The Ven. Dr. Michael Thompson and Dr. Andrea Mann

The Rev. Canon Michael Barlowe, Secretary of General Convention

The Church Center Staff: The Rev. Glenda McQueen
Church Pension Group [CPG]: Mr. Frank Armstrong and Ms. Anna Molin
Executive Council Liaisons: Ms. Zena Link and Ms. Becky Snow

Mandate

Resolution 2015-B003 of the 78th General Convention of the Episcopal Church gave the following mandates:

1) That the Episcopal Church acknowledge and affirm the Episcopal Church in Cuba's [ECC] synodical decision from Spring, 2015, to request membership as a Diocese of the Episcopal Church

2) That The Episcopal Church [TEC] identify and address canonical issues (including those around pension)

3) That the relationship between TEC and ECC be strengthened, promoting both greater understanding and fellowship

4) That both churches seek to promote mutual ministry and understanding

5) That TEC support our national leaders in moving to lift the embargo

6) That TEC establish a benevolent fund which provides retiring clergy of ECC with an annuity upon retirement

7) That TEC establish a team representative of a wide cross-section of the Church to facilitate our collaboration around these endeavors.

Summary of Work

The Taskforce on Cuba met four (4) times during the triennium: February, 2016; October, 2016; March 2017, and September 2017. Two (2) of the meetings occurred in Miami, Florida, and were attended by representatives from the Episcopal Church in Cuba [ECC]. Each of the meetings was attended by additional guests who provided valuable information on the various areas required by the mandate given by General Convention.

During this time, relationships were built and strengthened with members of the ECC; the respect and mutuality of these relationships have formed a solid basis for ongoing ministry together. This process promoted the building of trust which allowed for the exchange of history, story, and information that helped us to gain understanding. This holds great promise for the future development of relationships of respect and mutuality among the two (2) bodies.

Additionally, some members of the Task force visited Cuba during the triennium, individually and of their own accord, on People-to-People or Religious Visas to learn about the Church, meet its people and gain a realistic perspective on the challenges and successes of ministry and mission in the ECC.

Throughout our work, there was a wealth of experience, revealed history and current information about Cuba and the ECC to help focus and shape the resolutions this body brings forth.

BRIEF HISTORY

In 1966, with the effects of the Cuban Revolution, the House of Bishops of the Episcopal Church voted to disengage with the Diocese of Cuba. Prior to that time, in 1961, Episcopal Schools in Cuba had been closed and appropriated, and many clergy and their families were displaced. Some remained in Cuba; some either returned or immigrated to the United States. Some clergy who remained in Cuba were imprisoned, executed, or disappeared. Church buildings were closed and left to deteriorate. The Church was polarized politically, and its clergy and lay leaders suffered.

But the Church continued, in the living rooms of the grandmothers, who held prayer services and Bible Studies in their homes. Through them is transmitted a story of pain, and of faith.

THE EPISCOPAL CHURCH IN CUBA TODAY

Under the leadership of more recent Cuban Bishops, including Bishop Griselda Delgado, the people have devoted themselves to the vision of a missional church. Innovative projects are evolving that benefit the need of the local communities: creating day care centers, inventing irrigation systems that help with sustainable farming, developing animal husbandry to raise and tend to animals to help feed communities.

Some recent missional efforts are being supported through "Friends of Cuba," and other groups and dioceses that are able to fund and help start projects. In some rural places, these efforts have been instrumental in bringing needed portable water to towns and villages.

Yet, it has been the close and consistent relationship between the Diocese of Florida, and the Diocese of Cuba that has supported the ministry of the Church and pointed to a hopeful future during difficult times. Additionally, the work of the ECC is garnering success due to carefully tended relationships between the ECC leaders and governmental agencies. This allows for land use, building use, and the entrusting of animals to the care of the people on these projects.

Church buildings are being rebuilt due to these careful relationships. The buildings are multi-purpose--flexible spaces that are intended to be shared with the community for cultural events. The Cuban Church is rich in mission and ministry, strong in developing lay leadership, innovative, generous, faithful and resilient.

THE RELATIONSHIP BETWEEN THE ECC AND THE ACC

Members of the Anglican Church in Canada aided with our increased understanding of the relationship between the Episcopal Church in Cuba [ECC] and partnerships with nearby Dioceses and the Church of Canada [ACC]. With the disengagement of TEC from the ECC in 1966, the Anglican Church of Canada has over these years provided significant resources to the ECC, and we extend grateful thanks for their faithfulness to The Episcopal Church in Cuba.

INFORMATION FROM CPG

At every meeting of this Taskforce, a representative from CPG provided new information about the impact the pension requirements would have on The Episcopal Church in Cuba. The information provided is similar to the pension requirements for many of our diocese in Province IX. However, it also revealed a past liability for clergy in Cuba, for approximately $801,000. These are clergy who have served for many years, yet have been unable to pay into the pension fund due to the political situation. Clergy have been unable to participate in the state pension plan because they are clergy. Regardless of the years of service, the minimum annual benefit is $2,400 per clergy.

CONSTITUTION AND CANONS

The Episcopal Diocese of Cuba worked with a subcommittee of this Task force to produce a simple revision of the Constitution and Canons [C and Cs] of the Episcopal Church in Cuba. The revision would bring the C and Cs in alignment with the TEC Constitution and Canons, including the clause acceding to the C and C of the TEC. With review from the Anglican Church of Canada, the revision of the Constitution and Canons of The Episcopal Church in Cuba is to be passed by ECC at a special Synod before the resolution comes before the General Convention.

PROVINCIAL ASSIGNMENT

We consulted with the Taskforce to Study Provinces in order to gain understanding of the future direction of provinces.

ECC BUDGET

Bishop Griselda and José Raúl Ortiz provided a funding request for the ECC. A subcommittee of the Task Force reviewed the request and modifications. The request was realigned taking into account expected contributions from the ECC, potential funding from external sources, possible funding from TEC, declining funding from ACC and cost of living expenses for clergy.

Proposed Resolution

RESOLUTION A052: THE EPISCOPAL CHURCH IN CUBA

Resolved, That the 79th General Convention welcomes with joy the request of the sisters and brothers of the Episcopal Church in Cuba to reunite with the Episcopal Church;

Resolved, That the General Convention underscore its hope that the various dioceses of The Episcopal Church work in harmony and companionship with the Church in Cuba for evangelism, mutual understanding, and the full expression of God's mission;

Resolved, That the General Convention call upon the congregations and members of The Episcopal Church to acquaint themselves with the ministries of the Church in Cuba;

Resolved, That the General Convention call upon the dioceses and congregations of The Episcopal Church to consider ways in which they can be in relationship and partnership with the Church in Cuba going forward;

Resolved, That the General Convention express its deep gratitude to the Anglican Church of Canada for its long and continuing support for the Church in Cuba;

Resolved, That the General Convention request that all congregations keep the Church of Cuba in heartfelt and loving prayer.

Resolved, That effective the conclusion of the 79th General Convention, the clergy of the Diocese of Cuba shall be eligible to participate in The Church Pension Fund International Clergy Pension Plan (ICPP), consistent with the terms of the ICPP, applicable law and subject to receipt of any necessary licenses from the Office of Foreign Assets Control [O.F.A.C.] or any other applicable governmental authority;

Resolved, That the 79th General Convention requests that the Joint Standing Committee on Program, Budget and Finance allocate for payment to The Church Pension Fund an amount equal to the actuarial liability associated with providing active clergy in the Diocese of Cuba with retroactive credited service under the ICPP for services performed for the Diocese of Cuba, subject to compliance with applicable laws and the receipt of any necessary licenses from O.F.A.C. or any other applicable governmental authority; and be it further

Resolved, That the General Convention support the formation of a 3-year interim body to accompany the Diocese of Cuba as it fully integrates into the Episcopal Church.

Continuance Recommendation

The Taskforce on Cuba recommends a continuing opportunity to learn about and support the mutual relationship as it evolves in the next Triennium. To that end, individuals from both the current taskforce and a taskforce from the Episcopal Church in Cuba will need to form an interim body to meet over the next three (3) years to discuss arising issues and share and respond to new information as the relationship develops.

The body would consist of eight (8) members, four (4) from Cuba and four from other dioceses of the Episcopal Church to facilitate full integration into the life, ministry, and mission of the Episcopal Church. Budget request: $ 50,000.

TASK FORCE ON THE STUDY OF MARRIAGE

Membership

Ms. Joan Geiszler-Ludlum, *Chair*	East Carolina, IV	2018
The Rev. Brian C. Taylor, *Vice-Chair*	Chicago, V	2018
The Rev. Philip Dinwiddie, *Secretary*	Michigan, V	2018
The Rev. Stannard Baker	Vermont, I	2018
The Rt. Rev. Thomas Clark Ely	Vermont, I	2018
The Rev. Gianetta Hayes-Martin	California, VIII	2018
The Rev. Carlye Hughes	Fort Worth, VII	2018
The Rev. Canon Jordan Hylden	Dallas, VII	2018
The Rev. Dr. Ruth A. Myers	California, VIII	2018
The Rt. Rev. Steven A. Miller	Milwaukee, V	2018
The Rev. Canon Humphrey Paulino	Venezuela, IX	2018
The Rev. Canon Susan Russell	Los Angeles, VIII	2018
Ms. Deborah J. Stokes	Southern Ohio, V	2018
The Rt. Rev. Brian Thom	Idaho, VIII	2018
Ms. Melodie Woerman	Kansas, VII	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio V	2018
Mr. Christopher Hayes, *Liaison, Standing Commission on Structure, Governance, Constitution and Canons*	California, VIII	
Mr. Drew Nathaniel Keane, *Liaison, Standing Commission on Liturgy and Music*	Georgia, IV	

CHANGES IN MEMBERSHIP

Mr. James Ellis resigned in late 2016 and was replaced by the Rev. Carlye Hughes. Ms. Joan Geiszler-Ludlum became Chair and the Rev. Brian Taylor became Vice Chair in December 2016 at Taylor's request.

REPRESENTATION AT GENERAL CONVENTION

Bishop Brian Thom and Deputy Phil Dinwiddie are authorized to receive non-substantive amendments to this report at General Convention.

Mandate

Resolved, the House of Deputies concurring, That the 78th General Convention requests dioceses and parishes use 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 the 78th General Convention directs the Presiding Bishop and President of the House of Deputies to appoint jointly an expanded Task Force on the Study of Marriage to continue this work, consisting of not more than fifteen (15) people, including theologians, ethicists, pastors, liturgists, and educators, who represent the cultural and theological diversity in the Church; 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 be it further

Resolved, That the Task Force consult with (i) individuals and couples within these groups about their experience of faith and church life; and (ii) the results of diocesan and parochial study of "Dearly Beloved" toolkit; and be it further

Resolved, That the Task Force explore biblical, theological, moral, liturgical, cultural, and pastoral perspectives on these matters, and develop written materials about them which represent the spectrum of understanding in our Church and which include responses from theologians, ethicists, pastors, liturgists, social scientists, and educators who are not members of the expanded Task Force, and whose perspectives represent the spectrum of understandings on these matters in our Church; and be it further

Resolved, That the Task Force study and monitor, in consultation 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 educational and pastoral resources for congregational use on these matters that represents the spectrum of understandings on these matters in our Church.

Summary of Work

HISTORICAL CONTEXT: THE TASK FORCE ON THE STUDY OF MARRIAGE 2012-2015

The 77th General Convention in 2012 formed the initial Task Force on the Study of Marriage to explore biblical, theological, historical, liturgical, and canonical dimensions of marriage and develop tools for

theological reflection and norms for theological discussion at a local level. The Task Force responded with seven essays: 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; and Changing Trends and Norms in Marriages. These essays appeared as Appendix 1 to the Task Force's 2015 Blue Book Report and as an accessible PDF file.

In addition, the Task Force produced "Dearly Beloved: A Toolkit for the Study of Marriage", a curriculum for local groups, parishes and dioceses to facilitate discussion of marriage in all its dimensions and in the context of changing societal and cultural norms and legal structures of these times. "Dearly Beloved" consists of one-page summaries and discussion questions based on the essays prepared by the Task Force. The Dearly Beloved Toolkit appeared as Appendix 2 to the Task Force's 2015 Blue Book Report and as an accessible PDF file.

The 77th General Convention also asked the Task Force to address the pastoral need for priests to officiate at a civil marriage of a same-sex couple in states where authorized, in consultation with the Standing Commission on Liturgy and Music [SCLM] and the Standing Commission on Constitution and Canons [SCCC]. Tracking the increasing number of states making same-sex marriage available, SCLM proposed to authorize use of liturgies for same-sex marriage. In support of the liturgies, the Task Force proposed a rewrite of the marriage Canon (Canon I.18) making it:

- 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.

WORK DONE DURING THE 2015-2018 TRIENNIUM

MEETINGS

Generous funding from General Convention enabled the Task Force to meet in person four (4) times: twice in Baltimore, MD on November 18-21, 2015 and March 27-30, 2017, which also facilitated consultation with the Standing Commission on Liturgy and Music; and two (2) Task Force working meetings in Chicago September 27-29, 2016 and Salt Lake City, Utah August 28-30, 2017. In addition, work was conducted via email, a dedicated General Convention Office site, working group conference calls and eleven (11) video teleconferences: 2/24/16, 3/18/16, 6/20/16, 8/30/16, 2/24/17, 4/27/17, 5/31/17, 6/29/17, 8/3/17, 11/9/17, and 11/28/17.

The Task Force also sought conversation with a wide range of Episcopalians through social media, press releases to update the wider Church on the work in progress, a Facebook page that received one thousand six hundred (1,600) likes and four thousand three hundred (4,300) visits during this triennium, and targeted surveys to solicit and receive responses to questions about relationships, impact of the trial liturgies, responses to draft essays and the use and impact of the "Dearly Beloved" toolkit for local discussion.

HOW THE TASK FORCE DID ITS WORK

The expansive charge called for the Task Force to look at a broad range of relationships and households other than marriage that currently reflect the experience of one half of society and Church today, by means of a wide range of methodologies, disciplines and perspectives. At the same time, the Task Force is charged with the exploration of particular issues regarding marriage: the impact of the marriage of same-sex couples on our Church, and the relationship between Church and state in officiating marriages.

The Task Force organized the assigned work into four (4) working groups, based upon the various tasks defined for the Task Force by Resolution 2015-A037 (shown in quotations):

1. Pastoral: "consult with individuals and groups" across a variety of relationships statuses "about their experience of faith and church life."

2. Ecclesial: "study and monitor … the impact of same-sex marriage and rites of blessing on our Church" and promote and study the use and impact of the "Dearly Beloved" toolkit presented by the previous Task Force on the Study of Marriage to the 77th General Convention in 2012.

3. Academic: "explore biblical, theological, moral, liturgical, cultural, and pastoral perspectives" on the contemporary trends and norms identified by the Task Force on the Study of Marriage in the previous triennium; "develop written materials about them which represent the spectrum of understanding in our Church"; and "provide educational and pastoral resources for congregational use on these matters that represents the spectrum of understandings on these matters in our Church".

4. Functional: explore, study and monitor the continuing debate about clergy acting in dual roles on behalf of Church and State when officiating marriages.

A summary of the work of each task group follows here.

1. Pastoral Working Group

In order to fulfill Resolution 2015-A037's charge to "consult with individuals and groups" across a variety of relationships statuses "about their experience of faith and church life," the Pastoral Working Group did the following:

a. **Collect Stories:** The Pastoral Working Group tasks included small group meetings to gather stories, a Deputy/Bishop-wide survey, and individual interviews. After fruitful discussion in person and electronically, which included issues related to how data was collected, issues of bias,

how to elicit useful responses, groups to contact, etc., the Pastoral Working Group created a template/guideline for small group discussions. These took place between November 2015 and September 2016, using the following one-page discussion template:

The *Task Force on the Study of Marriage* of the General Convention of The Episcopal Church was charged to work during the triennium between General Convention 2015 in Salt Lake City and General Convention 2018 in Austin, Texas, reporting to the 2018 General Convention. We were formed as a result of Resolution 2015-A050, *Create Taskforce on the Study of Marriage*, which passed at the 2015 General Convention. The enabling language is as follows:

> **Resolution Text (Original)**
> *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 (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 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 (2) 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… (emphasis added)

The subcommittee on Pastoral issues will focus its work on collecting data, information and personal stories about the variety of intimate relationships that exist in and out of our Church. The Episcopal Church in 2000 passed a resolution that describes what we believe intimate relationships to be: …*such relationships will 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.* We know that marriage norms are changing rapidly. Listen to this piece from *A Prairie Home Companion* (link follows this paragraph), from the Valentine's Day show of 2016. It states the changes better and in more entertaining fashion that any words could here. http://prairiehome.publicradio.org/listen/?date=2016/02/13&identifier=apm_audio:/phc/segments/2016/02/13/phc_segment_09_20160213_128.mp3 (audio no longer available as of 11/30/2017)

Please think of intimate, committed – even sacred – relationships of "*fidelity, monogamy, mutual affection, respect, careful, honest communication* – that are filled with *holy love,* which you have known, witnessed, or of which you are aware. Reflect on those relationships for a moment and then respond to these questions:

1. Share (write or record) a brief story of such a relationship - formative for or important to you - that exists or existed inside or outside of traditional marriage.
2. How you respond to the above description?
3. What should the church's response be to these relationships?

b. Conduct a Survey: The Pastoral Working Group, after reviewing the responses from these discussions, decided that a survey sent to all Convention Deputies and Bishops would garner the broad response needed to gather a variety of relationship stories. We received one hundred and seventy (170) responses to the Relationship Survey, available in both English and Spanish, conducted between September 2016 and May 2017. The responses included:

- One hundred and fifty-seven (157) narrative responses to the following question (Question 1) which were woven into the Task Force's essays as illustrative material: "*Please tell us about a committed or intimate relationship – including dedication to singleness or commitment to an intentional religious community – in which you are involved, or of which you are aware, and how this has had a significant (positive or negative) impact on your life.*"

- Sixty-eight (68) responses to the following questions (Question 2 & 3) which inform the Task Force's mandate to "study and monitor … the impact of same-sex marriage and rites of blessing on our Church …": "*Was The Episcopal Church (or other church), diocese, or parish/congregation helpful to this relationship? If not helpful – or marginally helpful – how could the church have done better to support or nurture the relationship described?*"

- Fifty-seven (57) narrative responses to this question, added late in the fall of 2016: "*Since December 2015 the Episcopal Church has made marriage liturgies equally available to both opposite and same sex couples. Can you share a personal story of the impact this has had on you, your congregation or your diocese?*"

The respondents to the survey represented a broad range of provinces, ages, and relationships. The responses were narrative; respondents were asked to write about their own relationships or about relationships of which they were aware. Reponses included a variety of theological and political opinions on marriage and relationship. We received close to one hundred and sixty (160) of these accounts. Sixty (60) percent of the responses were written from the perspective of a male, and forty (40) percent female. Eighty-three (83) percent described marriages (both opposite sex and same sex), while twelve (12) percent wrote about committed, non-married couples, with three (3) percent describing other forms of relationship, and two (2) percent writing about singleness. Fifty-five (55) percent described a heterosexual relationship, thirty-eight (38) percent a LGBT relationship, and seven (7) percent other (transgender, single, etc.). Relationships described ranged in age from eighteen (18) to seventy-five (75) +, with the largest group of stories about couples between thirty-six (36) and sixty-five (65) years old. There were three (3) responses from Province IX. Persons of color are notably underrepresented among the stories received. The Pastoral Working Group sought additional responses from phone interviews. One respondent felt that individual interviews would be a better way of reaching a diverse constituency. The individual interviews that took place were helpful and meaningful. The Working Group also reached out, as time permitted, to groups within The Episcopal Church representing diverse peoples.

After reviewing the responses, the Pastoral Working Group worked with the Academic Working Group to identify excerpts which illustrate the essays found in the Appendix to this report. All responses may be accessed by following this link: [Survey Responses Impact of Liturgies (PDF)](https://extranet.generalconvention.org/staff/files/download/21046) (https://extranet.generalconvention.org/staff/files/download/21046)

2. Ecclesial Working Group

In order to fulfill Resolution 2015-A037's charge to "study and monitor … the impact of same-sex marriage and rites of blessing on our Church," the Ecclesial Working Group did the following:

a. Determined with certainty the policy of every diocesan bishop regarding the marriage of same-sex couples in his or her diocese, as well as the provisions for access that were made by those who do not permit it (in accordance with Resolution 2015 A054).

b. Gathered information from a sample of congregations that either agree or disagree with the decision of its diocesan bishop on the marriage of same-sex couples, seeking comment about any impact this has had on the life of the congregation.

c. Asked for comments from the Episcopal Church bishops of Province IX (consisting of seven (7) dioceses in the Caribbean, Central America and South America), provinces of the Anglican Communion and the churches with which The Episcopal Church is in full communion or partnership, on the impact of the adoption of Resolution A-054 on the Church.

Here is a summary of the results of this work.

Policies of diocesan bishops

The Task Force collected data from the one hundred and one (101) domestic dioceses on the implementation of the use of the trial liturgies for marriage authorized by General Convention Resolution 2015 A054. The Episcopal Church includes ten (10) dioceses in civil legal jurisdictions that do not allow marriage for same-sex couples. Since Church Canons require compliance with both civil and canonical requirements for marriage, the trial liturgies for marriage are not authorized for use in those dioceses.

Results show:

- Ninety-three (93) bishops have authorized use of the trial liturgies for marriage

- Seventy-three (73) authorized use of the trial liturgies for marriage without conditions

- Twenty (20) authorized use of the trial liturgies for marriage with varying conditions

- Eleven (11) - concurrent approval of rector and Vestry (Colorado, Eau Claire, Europe, Fond du Lac, Michigan, Milwaukee, Northern Indiana, South Dakota, Southern Virginia, West Texas, West Virginia)

- Three (3) - approval of Vestry and permission of the bishop (Alabama, East Tennessee, Oklahoma)

- Two (2) - completion of a parish study/discernment process (Texas, Upper South Carolina)

- One (1) - approval of the bishop (Southwest Florida)

- Three (3) - use of only one (1) of the three (3) rites (Alaska, Arkansas, Georgia). NOTE: there was no agreement among these three (3) dioceses on which trial liturgy was authorized.

- Eight (8) bishops (Albany, Central Florida, Dallas, Florida, North Dakota, Springfield, Tennessee and the Virgin Islands) have not authorized use of the trial liturgies for marriage

- Five (5) of these bishops (Albany, Central Florida, Dallas, Springfield, Tennessee) prohibited their use by clergy canonically resident in those dioceses, whether within or outside of the diocese

Provision for access

The Task Force then researched how the eight (8) dioceses declining to authorize the use of the trial liturgies responded to the portion of Resolution 2015 A054 that directed that bishops "will make provision for all couples asking to be married in this Church to have access to these liturgies."

In North Dakota, the diocesan bishop has provided DEPO [Delegated Episcopal Pastoral Oversight] for a parish requesting access to the liturgies, and in Central Florida the diocesan bishop has "an informal agreement" with the bishop of Southeast Florida for pastoral provision when the need arises. In Albany, Dallas, Florida and Tennessee, the diocesan bishop has instructed same-sex couples seeking access to these liturgies to go to a neighboring diocese. Albany, Central Florida, Dallas, Springfield and Tennessee explicitly forbade diocesan clergy from presiding at marriages using the trial liturgies outside the diocese. The Task Force found no data on provisions being made for couples to have access to these liturgies for the Virgin Islands.

In summary, the Task Force found that ninety-three (93) out of one hundred and one (101) dioceses are using the marriage liturgies authorized by Resolution 2015 A054. As noted in the Resolution, "it remains within the discretion of any Member of the Clergy of this Church to decline to preside at any rite." In the eight (8) dioceses where the bishops with jurisdiction have not given permission for use of the authorized rites, some have been active in providing a pastoral path for couples, in fulfillment of the charge by General Convention to "make provision for all couples to have access to these liturgies." Others among this group have thus far been inactive in this regard; leaving it to couples to find on their own another place where they might celebrate their marriage. All responses are summarized in an Excel spreadsheet which may be accessed by following this link: [Diocesan Marriage](#) [Policies (Excel spreadsheet)](#). (https://extranet.generalconvention.org/staff/files/download/21044)

Response from the Bishops of Province IX

A request for comment was made to the bishops of the seven (7) dioceses that comprise Province IX of The Episcopal Church: Colombia, the Dominican Republic, Ecuador Central, Ecuador Littoral, Honduras, Puerto Rico and Venezuela. The Task Force received a statement that was signed by six (6) bishops (five (5) diocesan and one (1) retired) representing the dioceses of Ecuador Littoral, Ecuador Central, the Dominican Republic, Venezuela and Honduras. The bishops of Colombia and Puerto Rico did not sign the statement.

Their approximately five hundred (500) word response begins by expressing distress at what they call the "disregard of the call to embrace and affirm what is established in the Holy Scriptures; practices that now threaten to tear apart and further dividing the Church." Proposed revisions to the Book of Common Prayer marriage rite, they caution, means that "our Church will be forced to accept social and cultural practices that have no Biblical basis." They conclude, "If the Church approves these changes, they are greatly deepening the breach, the division and the Ninth Province will have to learn to walk alone."   The full statement is available in both Spanish and English at this link: Responses Province IX Bishops (PDF) .
(https://extranet.generalconvention.org/staff/files/download/21043)

Response from Communion across Difference

The Task Force contacted the "Communion across Difference" bishops group to invite a narrative reflection on the implementation and impact of the trial liturgies for marriage during the triennium. The group had not met and were not able to comment.

Information from sample congregations

The Task Force determined that a survey of all congregations in The Episcopal Church to monitor and study the impact was not feasible, given the cost both to undertake it and to interpret the results. Therefore, it was decided to ask a sample of sixteen (16) congregations, of various sizes and locations, to answer questions about the impact on them of the action of General Convention to permit marriage of same-sex couples.

The Task Force asked four (4) congregations in each of these categories to respond to a questionnaire:

- ❖ Congregations that support the marriage of same-sex couples in a diocese where the bishop authorizes use of the rites (Congregation yes, Bishop yes)

- ❖ Congregations that do not support the marriage of same-sex couples in a diocese where the bishop does not authorize use of the rites (Congregation no, Bishop no)

- ❖ Congregations that support the marriage of same-sex couples in a diocese where the bishop does not authorize use of the rites (Congregation yes, Bishop no)

- ❖ Congregations that do not support the marriage of same-sex couples in a diocese where the bishop authorizes use of the rites (Congregation no, Bishop yes)

In the end, the Task Force received replies from two (2) of the four (4) congregations in each of the four (4) categories.

The Task Force asked for comments from both the priest who is in charge of the congregation and the senior warden. In some cases, replies came from both, and in other cases, only the priest replied. In a few instances, the senior warden said the priest's response matched theirs so agreed in total with it.

The Task Force realizes that the overwhelming majority of bishops (92 percent) allow the marriage of same-sex couples in his or her diocese, and that fifty (50) percent of the dioceses included in this look at sample congregations are part of the eight (8) percent that do not. However, this was done to explore the issue of impact on individual congregations from every side of the bishop-and-congregation dynamic.

Here is a summary of the responses, by category.

Congregation yes, Bishop yes

Not surprisingly, the congregations in this category report that overwhelming majorities of members support the marriage of same-sex couples and thus find the bishop's position to be favorable. One priest said marriage of same-sex couples has been helpful to that congregation and has furthered its mission.

The other priest, while supporting marriage equality, said there has been a growing loss of public debate about theological issues in that diocese, representing a loss of divergent voices. The priest also said that with their bishop granting approval, the issue was pushed to the local level, placing the burden and responsibility for a decision to parish clergy, a situation the person called "shameful."

Congregation no, Bishop no

There was a wider divergence of opinion on marriage of same-sex couples in this category than in instances where the congregation and bishop are in agreement. Each of the two (2) reporting congregations said membership was divided on the issue, with twenty (20) to thirty (30) percent in favor and another thirty (30) percent or more strongly opposed, with the remainder in between but tending against the marriage of same-sex couples.

In one instance, the priest and the senior warden held different opinions about the correctness and desirability of the marriage of same-sex couples in The Episcopal Church. In both congregations, however, there was deep concern about negative effects if marriage equality was authorized throughout The Episcopal Church or in that diocese, especially if the decision on whether to provide it was left to the local level. They liked that the bishop's action removed them from the decision-making process.

Congregation yes, Bishop no

Both congregations said that being in the minority in their diocese was frustrating and hurtful. In one case it was so difficult that the congregation sought episcopal oversight by another bishop. The other reported that their minority status was hard to tolerate.

One priest reported feeling snubbed by others in the diocese, and the other said that not being able to offer marriage to same-sex couples is hurting that congregation's capacity to grow in membership.

Both priests said that the issue was dividing their diocese and expressed deep regret that they were prevented from offering rites they want for the people of their congregations.

Congregation no, Bishop yes

Both priests reporting said their congregation was steadfast in the decision not to use the liturgies authorized to marry same-sex couples, with their membership in full or near-full agreement with them.

They report that the position of their diocese, and The Episcopal Church as a whole, is tolerated in their congregation, so long as they are not forced to go along with it. Both congregations reported that they would lose both members and revenue if required to marry same-sex couples, describing the issue overall as an unhelpful distraction.

Comments from other Anglican provinces and full-communion partners

The Ecclesial Working Group sent requests for comments to each province of the Anglican Communion, all five (5) of The Episcopal Church's full communion ecumenical partners, and to the Inter-Anglican Standing Commission for Unity, Faith, and Order.

All were asked to reply to this question: From your perspective and specific setting, what has been the impact of The Episcopal Church's authorization and use of liturgical rites for same-sex marriage and the blessing of same-sex unions on "the Church"? Responses ranged from one (1) sentence to eight (8) pages. Seven (7) Anglican Communion provinces responded: the Anglican Church of Australia, the Anglican Church of Congo, the Church of England, the Scottish Episcopal Church, the Episcopal Church of Sudan, the Anglican Church of Tanzania and the Anglican Church of West Africa.

Three full-communion ecumenical partners responded: the Evangelical Lutheran Church in America, the Moravian Church, Northern Province and the Old Catholic Churches of the Union of Utrecht. The Church of Wales and the Inter-Anglican Standing Commission for Unity, Faith, and Order promised a fuller response would be sent, but they were not available in time to be part of this report.

Results showed:

- Six (6) of the reporting Anglican Communion provinces say the action has had a negative impact in their context, or that they do not approve of the marriage of same-sex couples (the Anglican Church of Australia, the Anglican Church of Congo, the Church of England, the Episcopal Church of Sudan, the Anglican Church of Tanzania and the Anglican Church of West Africa)

- One (1) province said the action has had a positive impact and it has taken similar action itself (the Scottish Episcopal Church)

- All of the full-communion ecumenical partners said the action has had a positive impact (the Evangelical Lutheran Church in America, the Moravian Church, Northern Province, and the Old Catholic Churches of the Union of Utrecht)

All responses may be accessed by following these links: Responses Anglican Communion Provinces (PDF) and Responses Ecumenical Partners (PDF) and Response IASCUFO (PDF).
https://extranet.generalconvention.org/staff/files/download/21045
https://extranet.generalconvention.org/staff/files/download/21049
https://extranet.generalconvention.org/staff/files/download/21042

"Dearly Beloved" Toolkit: Use and Impact

In order to fulfill their second responsibility, as set forth in the enabling resolution, to monitor the results of diocesan and parochial study of "Dearly Beloved" toolkit, the Ecclesial Working Group made available a survey with two (2) purposes: to determine if and how the toolkit was used in the previous triennium, and to let those unfamiliar with the resource learn more by explaining the toolkit and providing a link to download it in the survey's introduction.

The survey was made available in both English and Spanish. The English version was completed by five hundred and seventy-three (573) people; the Spanish version, by fourteen (14) people. In both instances the majority of respondents were priests, followed by lay people, then bishops, deacons and others. Additionally, the majority of respondents in both surveys were reporting on behalf of a congregation, followed by a diocese or another group. The totality of data that was compiled through this research may be accessed at the following link: Toolkit Survey – English or Toolkit Survey – Spanish.   (English: https://extranet.generalconvention.org/staff/files/download/21047, Spanish: https://extranet.generalconvention.org/staff/files/download/21048)

English-language version

When asked if they had used the toolkit, eighty-seven (87) people (17.5 percent) said yes. Three hundred and thirty-three (333) people (66.9 percent) replied no. The remainder – seventy-eight (78) people or 15.7 percent – did not know. (The numbers do not add up to five hundred and seventy-three (573) respondents, because not everyone chose to answer every question.)

Those who indicated they had not used it were asked to give a reason. One hundred and ten (110) people said they did not know about it, forty-nine (49) said they had used a different resource on marriage instead and one hundred and thirty-six (136) said it was not suitable for use with their group. A variety of reasons were given for non-usage, but two (2) reasons had multiple replies: thirty-three (33) people said they didn't use it because they opposed the marriage of same-sex couples, and thirty (30) said their group already was in support. Seventy-three (73) people gave other reasons.

Of those who described their group's experience in using the toolkit, the largest segments of respondents indicated it was helpful: it was of overall value to their group (40 people), provided a frank forum for discussions (39 people), was a positive experience (38 people), provided new information about how the Church thinks about marriage (33 people), fostered a sense of charity

toward others during discussions (31 people) and helped people of different opinions respect each other more (27 people).

When asked for the toolkit's weaknesses, several answers described it as lengthy, wordy, cumbersome or filled with too much Church language. Not being available in Spanish was seen as a drawback.

Spanish-language version

The small number of respondents to the Spanish-language version makes it difficult to categorize answers, but these items stand out:

- Respondents came from: Colombia (2 people), Honduras (2 people), Dominican Republic (1 person), Puerto Rico (1 person) and the United States (1 person).

- Four (4) people said they had used the toolkit, four (4) had not used it and one (1) didn't know about its use. Of those who did not use it, three (3) said it was because they didn't know about it, and one (1) person said they had used different materials.

- Of those who described their group's experience in using the toolkit, two (2) said it was a positive experience, and one (1) person each said it was of overall general value, provided new information about how the Bible describes marriage, provided new information about how the Church thinks about marriage, provided a frank forum for discussions, changed minds on some aspect of marriage or blessings in the church and created a sense of schism among participants.

- One respondent said a weakness of the toolkit was that it did not pay attention to Latin culture.

3. Academic Working Group

In response to Resolution 2015-A037's charges to
- "explore biblical, theological, moral, liturgical, cultural, and pastoral perspectives" on the contemporary trends and norms identified by the Task Force on the Study of Marriage in the previous triennium;

- "develop written materials about them which represent the spectrum of understanding in our Church"; and

- "provide educational and pastoral resources for congregational use on these matters that represents the spectrum of understandings on these matters in our Church,"

The Task Force created an Academic Working Group, which accomplished the following:

a. **Collect Resources:** Following the directive to "include responses from theologians, ethicists, pastors, liturgists, social scientists and educators who are not members of the expanded Task Force, and whose perspectives represent the spectrum of understandings on these matters in our Church;" the Academic Working Group began by inviting faculty from every Episcopal seminary to

suggest resources as well as additional scholars, pastors and educators to contact. The Academic Group received recommendations for more than one hundred (100) books and articles; one-third of these were on the topic of sexuality, particularly same-sex relationships. Of particular note, the faculty of Nashotah House submitted an annotated bibliography of thirty-six (36) items. The committee reviewed each of these books and articles in preparation for developing a series of essays.

b. **Write Essays:** Drawing from the resources it had gathered as well as the essays prepared by the Task Force in the previous triennium, the Academic Working Group drafted short essays addressing contemporary trends and norms identified in Resolution 2015-A037: "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 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." The Task Force reviewed first drafts of these essays at its meeting in September 2016. In response to extensive feedback from the Task Force, the Academic Working Group reorganized and revised the essays.

c. **Solicit Responses to Essays:** At its March 2017 meeting, the Task Force discussed the revised essays. Moved by the stories from the surveys conducted by the Pastoral Working Group, the Task Force decided to incorporate a few of these personal narratives to illustrate the matters explored in the essays. After further revisions, in May 2017 the Task Force sent the essays to faculty at every Episcopal seminary, to other respondents identified when resources had been collected, and to additional respondents recommended by other members of the Task Force.

d. **Refine Essays based upon responses:** The Task Force received responses from twenty (20) individuals or organizations, and reviewed this feedback at its August 2017 meeting. Following that meeting, the Task Force refined and re-ordered the essays. Feedback not incorporated into the essays was summarized in a separate "Responses to the Essays."

The essays are included in the proposed "Liturgical Resources Two (2)" appended to this Task Force report. Because the essays build on the work of the previous Task Force, particularly the essay "Changing Trends and Norms in Marriage," the Task Force is recommending that the earlier essays also be published in Liturgical Resources 2.[1] An annotated bibliography provides the resources the Academic Working Group found to be especially helpful in its work. Since most of the contemporary trends and norms studied this triennium do not concern the relationships and marriages of same-sex couples, the bibliography does not include works devoted solely or primarily to this topic, although several of the items address this subject and provide additional references.

We encourage congregations, dioceses, and individuals to study these materials and draw upon them as a pastoral resource. Each of the essays includes a number of questions for consideration.

The questions appended to the essay "Culture, Ethnicity, and Marriage" are intended especially for couples and for clergy to use when preparing couples for marriage or counseling married couples. As an additional resource for study, Liturgical Resources 2 includes "Dearly Beloved: A Toolkit for the Study of Marriage" developed by the Task Force on the Study of Marriage in the previous triennium.

e. Propose a resolution to respond to a pastoral need: The Task Force's study of couples who desire the Church's blessing but not marriage identified a pastoral need of couples for whom the consequences of a legal civil marriage would pose a significant threat to their well-being. An older person who receives a deceased spouse's pension would lose the pension benefits upon remarriage and could be left destitute upon the death of a subsequent spouse. Undocumented immigrants may be deported when presenting identification needed to obtain a marriage license. An essay in the proposed new volume of "Enriching Our Worship" explores these issues. The Task Force is also proposing "The Blessing of a Relationship," intended solely as a religious rite of blessing for couples in such circumstances, and proposes the resolution [“A086 Authorizing Rites to Bless Relationships,”](#) (see below).

The Task Force's study included recognition of the growing number of persons entering into sexually intimate relationships other than marriage. This Task Force recommends that the General Convention establish a Task Force to develop resources that offer pastoral guidance and teaching about relationships involving sexual intimacy, and proposes the resolution [“A087 Develop Relationship Pastoral Resources”](#) (see below).

4. Functional Working Group

Directed to explore, study and monitor the debate about clergy acting on behalf of both the Church and the State when officiating marriages, the Task Force examined the historical role of the Church in officiating marriage over time, studied the current debate and arrived at a different approach by recasting the role of the clergy as agent and advocate for the couple. The full essay appears in Liturgical Resources 2, appended to this report.

RESOLUTIONS

The Task Force wrote three (3) resolutions for action by the 79th General Convention.

1. The first proposed resolution, [A085 Trial Use of Marriage Liturgies](see below), presents a road map for General Convention to fulfill forty (40) years of promises of full inclusion in the life of The Episcopal Church for LGBTQ+ individuals. The proposal:

- extends trial use of liturgies first authorized by the 78th General Convention for the 2018-21 triennium: "The Witnessing and Blessing of a Marriage," "The Celebration and Blessing of a Marriage 2," "The Blessing of a Civil Marriage 2," and "An Order for Marriage 2" (as revised and appended to the report of the Task Force on the Study of Marriage to the 79th General Convention);

- amends for trial use "Concerning the Service" for the Book of Common Prayer liturgies, "The Celebration and Blessing of a Marriage" and "The Blessing of a Civil Marriage";

- adds Rite 1 and Rite 2 versions of a Preface for Marriage 2, and

- amends and expands the Catechism's section "Other Sacramental Rites" concerning marriage.

The resolution outlines how General Convention might proceed to make these proposals permanent additions and revisions to the Book of Common Prayer [BCP]:

1) extend the period of trial use,

2) adopt these additions and alterations, at which time they would be added to future printings of the BCP, or

3) determine some other course of action.

Trial use is governed by Article X of the Constitution of The Episcopal Church and Canon II.3.6. "Trial use" means that the Church is considering these for inclusion in The Book of Common Prayer. To be added to the Prayer Book, two (2) successive General Conventions must authorize the liturgies in identical form.

Some suggested to the Task Force that the 79th General Convention could treat the action of the 78th General Convention as the first reading to add the authorized trial liturgies to the Book of Common Prayer. The Task Force declined to embrace this view because:

- the liturgies for trial use were neither presented nor proposed for the first reading to the 78th General Convention and did not include the required resolve that it be sent timely to the Secretary of the Convention of every Diocese to be made known to the next Diocesan Convention meeting;

- the liturgies for trial use need some period of use with systematic survey and study to assure that these not only read well but also pray well in actual use;

- additional concurrent changes in the rubrics, the prefaces and the catechism are needed to make clear that marriage is available to any couple.

- The resolution calls for the trial liturgies for marriage along with other materials for marriage to be published and made available electronically in Liturgical Resources 2 which appears in the Supplemental Materials section of this report.

2. The second proposed resolution, A086 Authorize Rites to Bless Relationships (see below), proposes adding two (2) liturgies to the "Enriching Our Worship" series. (https://extranet.generalconvention.org/staff/files/download/21231). The 78th General Convention authorized for use "The Witnessing and Blessing of a Lifelong Covenant" as revised from the liturgy first authorized by the 77th General Convention. That liturgy has been published in Liturgical Resources 1, and the Task Force recommends that it now be added to the "Enriching Our Worship" series.

The Task Force proposes a second liturgy for inclusion in the "Enriching Our Worship" series, "The Blessing of a Lifelong Relationship", responding to study of contemporary trends and the expressed experiences of Episcopalians who desire to form and formalize a lifelong, monogamous and unconditional relationship, other than marriage, in particular circumstances. The Task Force has adapted this liturgy from "The Witnessing and Blessing of a Lifelong Covenant, recognizing that a rite that closely resembles marriage could create civil legal difficulties for some couples. Both liturgies appear in the Supplemental Materials section of this report.

As the Task Force on the Study of Marriage studied trends in marriage today and listened to the experiences of Episcopalians, the Task Force heard a desire that "The Witnessing and Blessing of a Lifelong Covenant" be available throughout The Episcopal Church for:

1. Couples who desire to form and to formalize a relationship that is monogamous, unconditional, and lifelong, but is nevertheless something different than a marriage in that it does not include the merging of property, finances, or other legal encumbrances. In this, they have in mind the needs and rights of children of a former marriage; a desire to honor the work and intention of their former spouse; a need to maintain their ability to uphold the financial obligations and commitments of their household; and a desire to maintain their ability to support themselves with shelter, food, and health care, recognizing that a new marriage would cut off the benefits they receive from their former spouse, and if their subsequent marriage should end in death or divorce, they would be left without any pension or health care.

2. Couples for whom the requirement to furnish identification to obtain a marriage license could result in civil legal penalties including deportation, because of their immigration status. The Task Force on the Study of Marriage has revised "The Witnessing and Blessing of a Lifelong Covenant," recognizing that a rite that closely resembles marriage could create civil legal difficulties for some couples. The proposed liturgy, "The Blessing of a Lifelong Relationship," would be included in the "Enriching Our Worship" series. The Task Force strongly encourages couples contemplating using this rite for a blessing of their relationship to seek civil legal counsel before the celebration.

3. The third proposed resolution, A087 Develop Relationship Pastoral Resources (see below), recognizes the rising rate and number of U. S. adults in sexually intimate relationships other than marriage and calls for the development of resources that provide spiritual, teaching and pastoral guidance for these relationships.

Proposed Resolutions

RESOLUTION A085 TRIAL USE OF MARRIAGE LITURGIES

Resolved, the House of _____ concurring, That the 79th General Convention, in accordance with Article X of the Constitution and Canons II.3.6, authorize for trial use as additions to The Book of Common Prayer (to be inserted following page 438) "The Witnessing and Blessing of a Marriage," "The Celebration and Blessing of a Marriage 2," "The Blessing of a Civil Marriage 2," and "An Order for Marriage 2" (as revised and appended to the report of the Task Force on the Study of Marriage to the 79th General Convention), beginning the First Sunday of Advent 2018; and be it further,

Resolved, That paragraph 1 of "Concerning the Service" regarding "The Celebration and Blessing of a Marriage" and "The Blessing of a Civil Marriage" (Book of Common Prayer page 422) be amended for trial use in accordance with Article X of the Constitution and Canon II.3.6 to read as follows:
Christian marriage is a solemn and public covenant between ~~a man and a woman~~ *two people* in the presence of God. In The Episcopal Church it is required that one (1), at least, of the parties must be a baptized Christian; that the ceremony be attested by at least two (2) witnesses; and that the marriage conform to the laws of the State and the Canons of this Church. And be it further

Resolved, That the following Preface for Marriage 2 be authorized for trial use as an addition to The Book of Common Prayer (to be inserted on page 349) in accordance with Article X of the Constitution and Canon II.3.6:
Because in the marriage of two (2) people in faithful love, thou dost reveal unto us the joy and abundant life thou sharest with thy Son Jesus Christ and the Holy Ghost. And be it further

Resolved, That the following Preface for Marriage 2 be authorized for trial use as an addition to The Book of Common Prayer (to be inserted on page 381) in accordance with Article X of the Constitution and Canons II.3.6:
Because in the marriage of two (2) people in faithful love, you reveal the joy and abundant life you share with your Son Jesus Christ and the Holy Spirit. And be it further

Resolved, That the section "Other Sacramental Rites" in "An Outline of the Faith commonly called the Catechism" in The Book of Common Prayer (page 861) be amended for trial use in accordance with Article X of the Constitution and Canons II.3.6 to read as follows:
    Q. What is Holy Matrimony?

A. Holy Matrimony is Christian marriage, in which *two (2) people* ~~the woman and man~~ enter into a life-long union, make their vows before God and the Church, and receive the grace and blessing of God to help them fulfill their vows.

Q. What is required of those to be married?
A. It is required of those to be married that at least one (1) member of the couple be baptized and that they have been instructed that Christian marriage is an unconditional, mutual, exclusive, faithful and lifelong commitment intended for the couple's mutual joy, for the help and comfort given to each other in prosperity and adversity, and, when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God. And be it further

Resolved, That these additions and alterations to The Book of Common Prayer authorized for trial use by this Convention are understood to be for the period between the 79th and 80th General Conventions, with the option to 1) extend the period of trial use, 2) adopt on second reading, without amendment, these materials as additions/alterations to The Book of Common Prayer; or 3) take some other course of action as determined by the 80th General Convention; and be it further

Resolved, That these alterations and additions be published in "Liturgical Resources 2" (as appended to the report of the Task Force on the Study of Marriage); and be it further

Resolved, That bishops exercising ecclesiastical authority or, where appropriate, ecclesiastical supervision, will make provision for all couples asking to be married in this Church to have reasonable and convenient access to these trial liturgies; and be it further

Resolved, That bishops continue the work of leading the Church in comprehensive engagement with these materials and 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.18.7 applies by extension to these liturgies authorized for trial use, namely, "It shall be within the discretion of any Member of the Clergy of this Church to decline to solemnize or bless any marriage"; and be it further

Resolved, That the provisions of Canon I.19.3 regarding marriage after divorce apply equally to these liturgies authorized for trial use, in accordance with guidelines established by each diocese; and be it further

Resolved, That this Church continue to honor theological diversity 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 support for or objection to the 79th General Convention's action pertaining to this resolution; and be it further

Resolved, That in accordance with Article X of the Constitution, notice of this resolution "be sent within six (6) months to the Secretary of the Convention of every Diocese, to be made known to the Diocesan Convention at its next meeting"; and be it further

Resolved, That the 79th General Convention direct the Secretary of General Convention and the Custodian of the Standard Book of Common Prayer, in consultation with the outgoing Chair of the Task Force on the Study of Marriage and the Chairs of the Legislative Committees to whom this legislation is referred, to finalize and arrange with Church Publishing for the publication (in English, Spanish, and French) of the material contained in "Liturgical Resources 2" as approved by the 79th General Convention; the General Convention Office to make these materials available electronically at no cost no later than the first Sunday of Advent 2018.

EXPLANATION
For over forty (40) years The Episcopal Church has been discussing the place of same-sex couples in its common life. During this time, some dioceses and congregations gradually began offering liturgical blessings of the lifelong monogamous relationships of same-sex couples. In 2000, the General Convention adopted Resolution D039 (subsequently reaffirmed by successive General Conventions) expressing the Church's understanding and expectation that marriage and other life-long committed relationships "will 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."

The 2012 General Convention authorized liturgical resources for "The Witnessing and Blessing of a Lifelong Covenant" (Resolution 2012-A049), and three (3) years later the 2015 General Convention authorized the trial use of two (2) liturgies for marriage, available for use by all couples ("The Witnessing and Blessing of a Marriage" and "The Celebration and Blessing of a Marriage 2"), as well as the continued use of "The Witnessing and Blessing of a Lifelong Covenant" (Resolution 2015-A054).

With the June 2015 United States Supreme Court decision permitting the civil marriage of same-sex couples anywhere in the United States, same-sex couples have been able to have their marriages solemnized in domestic dioceses of The Episcopal Church in conformity with both the laws of the State and the Canons of the Church (Canon I.18.1). "The Witnessing and Blessing of a Lifelong Covenant" allows the blessing of same-sex couples in civil jurisdictions where their marriage is not permitted by civil law, and authorization for use of this liturgy is not changed by these provisions for trial use of liturgies for marriage.

In a survey of U.S. dioceses in 2017, the Task Force on the Study of Marriage learned that ninety-three (93) Bishops with jurisdiction authorized the trial use of the marriage liturgies. Seventy-three (73) of those bishops authorized their use with no conditions. Twenty (20) bishops authorized their use with some conditions. Of those twenty (20), twelve (12) required Vestry approvals, two (2) required Vestry approval and permission of the Bishop, one (1) required approval of the Bishop, two (2) required a parish discernment process and three (3) authorized only one of the available rites. Eight (8) bishops did not allow the trial use of the marriage liturgies. These liturgies have been widely used throughout the Church, and this resolution brings these liturgies before this Convention for continued trial use, with additional proposed revisions of The Book of Common Prayer [BCP].

This resolution authorizes additions to the Book of Common Prayer, including,

1. Two (2) liturgies for marriage available to all couples: "The Witnessing and Blessing of a Marriage" and "The Celebration and Blessing of a Marriage 2"

2. "The Blessing of a Civil Marriage 2"

3. "An Order for Marriage 2," a flexible order of service similar to "An Order for Marriage" in the 1979 Book of Common Prayer (pp. 435-36).

These liturgical materials would be authorized for trial use in accordance with Article X of the Constitution of The Episcopal Church and Canon II.3.6. "Trial use" means that the Church is considering these for inclusion in The Book of Common Prayer. To be added to the Prayer Book, two (2) successive General Conventions must authorize the liturgies in identical form. As additions to the Prayer Book, these liturgies would not replace the current BCP liturgies "The Celebration and Blessing of a Marriage," "The Blessing of a Civil Marriage," and "An Order for Marriage."

Canon II. 3.6(a) allows General Convention to specify any special terms or conditions under which such trial use shall be carried out. This resolution requires bishops exercising ecclesiastical authority (or, where appropriate, ecclesiastical supervision) to make provision for all couples asking to be married in this Church to have reasonable and convenient access to these trial liturgies.

During the period of trial use, the liturgies and other revised materials would be published in "Liturgical Resources 2," but they would not appear in new printings of The Book of Common Prayer. The 80th General Convention, in 2021, could 1) extend the period of trial use, 2) adopt these additions and alterations, at which time they would be added to future printings of the BCP or 3) determine some other course of action.

In addition to the liturgies to be added to The Book of Common Prayer, this resolution would change one (1) rubric and add one (1) liturgical text in order to recognize marriage between same-sex couples. The description of marriage in the section "Concerning the Service" (BCP p. 422) would be revised to state that marriage is a covenant between "two people" rather than between "a man and a woman." An additional Proper Preface for use at a nuptial Eucharist is proposed for both Rite I and Rite II.

The Catechism would also be revised to state that Christian marriage involves "two people," rather than "the man and the woman." A second question about marriage would be added (just as a second question about Confirmation explains the requirements of those to be confirmed) to indicate the Canonical requirements for marriage, including instruction in the purposes of Christian marriage.

This resolution provides guidance for implementing trial use. Given that we are now considering revision of The Book of Common Prayer, it is important as ever that bishops provide generous pastoral response to meet the needs of members of the Church and that they lead the Church in engaging with these materials. The provisions acknowledging that any member of the clergy may decline to solemnize or bless a marriage (Canon I.18.7) and that the provisions regarding marriage after divorce (Canon I.19.3) apply to the use of the trial liturgies were also in the 2015 Resolution, along with an assurance that no one in the Church, lay person, bishop, priest, or deacon, shall suffer any coercion or penalty because of theological support for or opposition to the blessing or marriage of same-sex couples.

The final resolve provides the mechanism for publishing and making this material available to the Church.

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RESOLUTION A086 AUTHORIZE RITES TO BLESS RELATIONSHIPS

Resolved, the House of _____ concurring, That the 79th General Convention authorize "The Witnessing and Blessing of a Lifelong Covenant" (as appended to the report of the Task Force on the Study of Marriage), authorized for use by the 78th General Convention, to be added to the "Enriching Our Worship" series, for use in jurisdictions of the Episcopal Church in which 1) the couple desiring marriage are of the same sex; and 2) the civil jurisdiction in which the marriage would occur does not allow marriage of same-sex persons; and be it further

Resolved, That the 79th General Convention authorize "The Blessing of a Lifelong Relationship" (as appended to the report of the Task Force on the Study of Marriage) for inclusion in the "Enriching Our Worship" series; and be it further

Resolved, That "The Blessing of a Lifelong Relationship" shall not be used for mere convenience. It may be used 1) by couples who desire to form and to formalize a relationship with one another that is monogamous, unconditional and lifelong, but is nevertheless something different than a marriage in that it does not include the merging of property, finances or other legal encumbrances; and 2) by couples for whom the requirement to furnish identification to obtain a marriage license could result in legal penalties including deportation, because of their immigration status; and be it further

Resolved, That these rites are to be used under the direction of a bishop exercising ecclesiastical authority; and be it further

Resolved, That it shall be within the discretion of any Member of the Clergy of this Church to decline to officiate at any rite of blessing defined herein; and be it further

Resolved, That this Church continue to 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 conscientious objection to or support for these rites; and be it further

Resolved, That the 79th General Convention direct the Secretary of General Convention and the Custodian of the Standard Book of Common Prayer, in consultation with the outgoing Chair of the Task Force on the Study of Marriage and the Chairs of the Legislative Committees to whom this legislation is referred, to finalize and arrange with Church Publishing for the publication (in English, Spanish, and French) of the material contained in "Enriching Our Worship" as approved by the 79th General Convention; the General Convention Office to make these materials available electronically at no cost no later than the first Sunday of Advent 2018.

EXPLANATION
In response to Resolution 2009-C056, the Standing Commission on Liturgy and Music developed "The Witnessing and Blessing of a Lifelong Covenant" as a rite for blessing same-sex relationships. The rite was authorized for use by the 2012 General Convention (Resolution 2012-A049), then revised and authorized for use by the 2015 General Convention (Resolution 2015-A054). This rite is intended for use only in jurisdictions of The Episcopal Church in which 1) the couple desiring marriage are of the same sex; and 2) the civil jurisdiction in which the marriage would occur does not allow marriage of same-sex persons. This resolution proposes that this rite be included in the Enriching Our Worship series.

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RESOLUTION A087 DEVELOP RELATIONSHIP PASTORAL RESOURCES

Resolved, the House of _____ concurring, That the 79th General Convention acknowledge and minister to the growing number of persons entering into sexually intimate relationships other than marriage by calling for the development of resources that provide pastoral guidance and teaching on relationships that involve sexual expression; and be it further

Resolved, That the following statement guide the development of these resources: "Qualities of relationship that ground in faithfulness the expression of sexual intimacy include: fidelity, monogamy, commitment, mutual affection, mutual respect, careful and honest communication, physical maturity, emotional maturity, mutual consent, and the holy love which enables those in intimate relationships to see in each other the image of God"; and be it further

Resolved, That the 79th General Convention provide guidance to persons seeking to honor God's call in all aspects of their lives by calling for the development of resources, including but not limited to spiritual practices, to aid individuals and couples in discerning their vocation to relationship, be it to singleness, celibacy, marriage and/or parenting; and be it further

Resolved, That the Presiding Officers of the House of Bishops and the House of Deputies appoint jointly a task force to develop these resources; and be it further

Resolved, That the task force report and offer these resources to the 80th General Convention for their consideration; and be it further

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

EXPLANATION
In 2016, the number of U.S. adults in cohabiting relationships was eighteen (18) million persons. This represents an increase in cohabiters of twenty-nine (29) percent over a nine (9) year period. In 2016, persons aged fifty (50) and older accounted for twenty-three (23) percent of cohabiters, or roughly 4.1 million persons. This represents a seventy-five (75) percent increase in older cohabiters over a nine (9) year period.* Over the past fifty (50) years cohabitation in the U.S. has increased nearly nine hundred (900) percent.** Clearly the number of persons in sexually intimate relationships outside of marriage is increasing rapidly. Yet when it comes to nuanced and sensitive guidance and teaching regarding sexual intimacy, many people feel largely alone, having found the Church's counsel to remain sexually abstinent outside of marriage, insufficient and unreflective of their experience of the holy in relationship. This resolution calls on the church to develop resources that provide pastoral guidance and teaching on relationships that involve sexual expression. These resources may be used by individuals or couples, they may be used by Church small groups or in college chaplaincies, they may be used by middle-aged or mature Christians who are seeking guidance and direction as they seek to live in a way that is both faithful to God and expressive of the love and commitment they deeply feel.

In the work of the Task Force on the Study of Marriage in this triennium, a number of qualities have come to the fore that ground the expression of sexual intimacy in faithfulness. This resolution directs a task force to use these qualities as a foundation to guide the development of pastoral guidance and teaching on relationships that involve sexual expression.

God's call pervades all aspects of our lives, including our relationships. We may have a vocation to a state of relationship, be it singleness, celibacy or marriage; we may be called to form particular relationships with specific people, as God called Joseph, Guardian of Our Lord, to be Mary's husband (Matthew 1:18-25). Parenthood was once taken for granted as an inseparable part of marriage, but is now a choice—one that can sometimes involve the physically, emotionally, and financially costly processes of adoption or assisted reproduction. As with any vocation, God's call to relationship requires careful, ongoing discernment. Also, God's call to us can change over the course of our lives. A person called to singleness as a young adult may be called to marriage in middle age, or a person called to marriage may be called to singleness after the death of a spouse. This resolution would lead to the creation of resources, including spiritual practices of listening for the voice of the Holy Spirit, that can be used by individuals and couples, with the help of their faith communities, to discern their vocation to relationship.

* Pew Research Center: "Number of U.S. adults cohabiting with a partner continues to rise, especially among those 50 and older. Renee Stepler. April 6, 2017. http://www.pewresearch.org/fact-tank/2017/04/06/number-of-u-s-adults-cohabiting-with-a-partner-continues-to-rise-especially-among-those-50-and-older/ last accessed November 11, 2017.

** Reports to the 79th General Convention, otherwise known as the 2015 Blue Book Reports. Report of the Task Force on the Study of Marriage: Essay 7, Section 5. Page 575.

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Continuance Recommendation

The Task Force on the Study of Marriage has faithfully fulfilled the charges given its iterations over two (2) triennia. The doctrine and practice of marriage and other relationships marked by sexual intimacy may never be settled once and for all and will need continuous attention. Full marriage equality for same-sex couples will not be complete until the liturgies for marriage reflect gender neutrality and are added to the Book of Common Prayer. Positioning these liturgies in other liturgical resources continues to send the message of separate and not equal to LGBTQ+. Continued study and monitoring of the implementation and use of the trial liturgies to their inclusion in the Book of Common Prayer is necessary to reach the full measure of inclusion. The Task Force suggests that existing interim bodies are well equipped to see the work of the past forty (40) years through to its conclusion.

End Notes

[1]"I Will Bless You, and You Will Be a Blessing," Liturgical Resources 1 (Church Publishing, 2012), includes the liturgy and other resources for blessing same-sex relationships that the Standing Commission on Liturgy and Music developed during the 2009-2012 triennium. The revised and expanded edition (Church Publishing, 2015) includes the liturgies for marriage authorized for trial use by the 2015 General Convention.

Supplemental Materials

Liturgical Resources 2

As presented to the 79th General Convention, 2018

Table of Contents

I. Introduction

The materials in this volume were developed by the Standing Commission on Liturgy and Music between 2009 and 2015, by the Task Force on the Study of Marriage appointed after the 2012 General Convention, and by an expanded Task Force on the Study of Marriage appointed after the 2015 General Convention. The rites of "The Witnessing and Blessing of a Marriage" and "The Celebration and Blessing of a Marriage 2" were first authorized for trial use in 2015 by the 78th General Convention.

Liturgical Resources
In 2009, the General Convention of The Episcopal Church directed the Standing Commission on Liturgy and Music (SCLM) to "collect and develop theological and liturgical resources" for blessing same-sex relationships (Resolution 2009-C056). The commission developed "The Witnessing and Blessing of a Lifelong Covenant," which the 2012 General Convention authorized for provisional use (Resolution 2012-A049).

During the next triennium (2012-2015), the SCLM prepared an adaptation of the 2012 liturgy that can be used for the marriage of any couple ("The Witnessing and Blessing of a Marriage"), as well as "The Celebration and Blessing of a Marriage 2," a gender-neutral adaptation of the marriage rite in the 1979 *Book of Common Prayer*. The 2015 General Convention authorized both liturgies for trial use. The same convention revised the marriage canon to allow clergy to solemnize a marriage using any of the liturgical forms authorized by The Episcopal Church (Canon I.18.1).

Resolution 2015-A037 directed the expanded Task Force on the Study of Marriage, in consultation with the SCLM, to study and monitor the impact of the marriage of same-sex couples on The Episcopal Church, and to make recommendations to the 79th General Convention. The task force heard concerns about "separate but equal" rites, that is, that rites not included in *The Book of Common Prayer* are not of equal status with those that are. Accordingly, the task force recommends that the 79th General Convention authorize these liturgies for trial use as additions to *The Book of Common Prayer*.

In order to recognize marriage between same-sex couples, the task force also proposes a revision of the rubric "Concerning the Service" of The Celebration and Blessing of a Marriage, along with an additional Proper Preface for Marriage, for use in eucharistic prayers (Rite I and Rite II) at a nuptial eucharist. In addition, the task force proposes a revision to the Catechism to state that Christian marriage involves two people, rather than specifying a man and a woman, and adds a question

concerning the requirements for those seeking to be married in The Episcopal Church, similar to a question about the requirements for those to be confirmed.

Essays

As the Standing Commission on Liturgy and Music developed liturgical resources for blessing same-sex relationships, it faced repeated questions about marriage. In response, the commission recommended to the 2012 General Convention the creation of a task force on the study of marriage. The task force that convened from 2012-2015 addressed the question, "What might The Episcopal Church have to say to today's world as to what makes a marriage Christian and holy?" Their research and reflection led to seven essays, which were presented to the 2015 General Convention.

The task force identified a number of contemporary trends and norms in marriage and family life, and the 2015 General Convention directed an expanded task force to continue to study those trends and norms. This latter task force developed a series of short essays to invite reflection about marriage and human sexuality, along with a list of resources for further study. The collections of essays from both task forces (2012-2015 and 2015-2018) are included in this volume.

The 2015 General Convention also directed the expanded task force to study the debate about clergy acting as "agents of the state" at marriages. In response, the task force prepared an essay that includes historical background and contemporary perspectives, and concludes with a suggestion to consider clergy as "agents of the couple," acting as advocates for those entering both the sacred and civil commitments of marriage.

A Toolkit for the Study of Marriage

The Task Force on the Study of Marriage created in 2012 began its work by created a toolkit for the study of marriage that was released in June 2014. An updated version of the toolkit was included in the report of the task force to the 2015 General Convention, and the convention requested that congregations and dioceses use the toolkit.

Pastoral Resources

The material for premarital preparation was originally developed as part of the resources for blessing same-sex relationships prepared by the SCLM during the 2009-2012 triennium. It has been revised to be suitable for use with any couple preparing for marriage. While Canon I.18.3(c) requires that couples be instructed "in the nature, purpose, and meaning, as well as the rights, duties and responsibilities of marriage," the use of these resources for preparation is not required.

Conclusion

The Task Force on the Study of Marriage offers this material to The Episcopal Church in the hopes that these resources will enable us as Christians to deepen our understanding of marriage and will strengthen our witness to the Gospel.

The Task Force on the Study of Marriage
December 2017

II. LITURGICAL RESOURCES
proposed for trial use

as presented to the 79th General Convention

Contents

* Prepared by the Task Force on the Study of Marriage, 2015-2018
** Prepared by the Standing Commission on Liturgy and Music, 2012-2015

The Celebration and Blessing of a Marriage

Concerning the Service

Note: This paragraph is proposed for trial use as an amendment of paragraph 1, Concerning the Service, BCP p. 422.

Christian marriage is a solemn and public covenant between two people in the presence of God. In The Episcopal Church it is required that one, at least, of the parties must be a baptized Christian; that the ceremony be attested by at least two witnesses; and that the marriage conform to the laws of the State and the canons of this Church.

The Celebration and Blessing of a Marriage 2

Concerning the Service

At least one of the parties must be a baptized Christian; the ceremony must be attested by at least two witnesses; and the marriage must conform to the laws of the State.

A priest or a bishop normally presides at the Celebration and Blessing of a Marriage, because such ministers alone have the function of pronouncing the nuptial blessing, and of celebrating the Holy Eucharist.

When both a bishop and a priest are present and officiating, the bishop should pronounce the blessing and preside at the Eucharist.

A deacon, or an assisting priest, may deliver the charge, ask for the Declaration of Consent, read the Gospel, and perform other assisting functions at the Eucharist.

Where it is permitted by civil law that deacons may perform marriages, and no priest or bishop is available, a deacon may use the service which follows, omitting the nuptial blessing which follows The Prayers.

It is desirable that the Lessons from the Old Testament and the Epistles be read by lay persons.

In the opening exhortation (at the symbol of *N. N.*), the full names of the persons to be married are declared. Subsequently, only their Christian names are used.

Additional Directions are on page xxx.

The Celebration and Blessing of a Marriage 2

At the time appointed, the persons to be married, with their witnesses, assemble in the church or some other appropriate place.

During their entrance, a hymn, psalm, or anthem may be sung, or instrumental music may be played.

Then the Celebrant, facing the people and the persons to be married, addresses the congregation and says

> Dearly beloved: We have come together in the presence of God to witness and bless the joining together of *N.* and *N.* in Holy Matrimony. The joining of two people in a life of mutual fidelity signifies to us the mystery of the union between Christ and his Church, and so it is worthy of being honored among all people.
>
> The union of two people 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 gift 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 accordance with the purposes for which it was instituted by God.
>
> Into this holy union *N. N.* and *N. N.* now come to be joined.
>
> If any of you can show just cause why they may not lawfully be married, speak now; or else for ever hold your peace.

Then the Celebrant says to the persons to be married

> I require and charge you both, here in the presence of God, that if either of you knows any reason why you may not be united in marriage lawfully, and in accordance with God's Word, you do now confess it.

The Declaration of Consent

The Celebrant says to one member of the couple, then to the other

> *N.,* will you have this *woman/man/person* to be your *wife/husband/spouse*; to live together in the covenant of marriage? Will you love *her/him,* comfort *her/him,* honor and keep *her/him,* in sickness and in health; and, forsaking all others, be faithful to *her/him* as long as you both shall live?

Answer   I will.

The Celebrant then addresses the congregation, saying

> Will all of you witnessing these promises do all in your power to uphold these two persons in their marriage?

People   We will.

If there is to be a presentation or a giving in marriage, it takes place at this time.

See Additional Directions, p. xxx.

A hymn, psalm, or anthem may follow.

Task Force on the Study of Marriage

The Ministry of the Word

The Celebrant then says to the people

> The Lord be with you.

People   And also with you.

Celebrant   Let us pray.

> O gracious and everliving God, you have created humankind in your image: Look mercifully upon *N.* and *N.* who come to you seeking your blessing, and assist them with your grace, that with true fidelity and steadfast love they may honor and keep the promises and vows they make; through Jesus Christ our Savior, who lives and reigns with you in the unity of the Holy Spirit, one God, for ever and ever. *Amen.*

Then one or more of the following passages from Holy Scripture is read. Other readings from Scripture suitable for the occasion may be used. If there is to be a Communion, a passage from the Gospel always concludes the Readings.

> Genesis 1:26–28 *(Male and female he created them)*
> Song of Solomon 2:10–13; 8:6–7 *(Many waters cannot quench love)*
> Tobit 8:5b–8 *(New English Bible) (That she and I may grow old together)*
>
> 1 Corinthians 13:1–13 *(Love is patient and kind)*
> Ephesians 3:14–19 *(The Father from whom every family is named)*
> Ephesians 5:1–2 *(Walk in love, as Christ loved us)*
> Colossians 3:12–17 *(Love which binds everything together in harmony)*
> 1 John 4:7–16 *(Let us love one another, for love is of God)*

Between the Readings, a psalm, hymn, or anthem may be sung or said. Appropriate psalms are Psalm 67, Psalm 127, and Psalm 128.

When a passage from the Gospel is to be read, all stand, and the Deacon or Minister appointed says

> The Holy Gospel of our Lord Jesus Christ according to_____.

People   Glory to you, Lord Christ.

> Matthew 5:1–10 *(The Beatitudes)*
> Matthew 5:13–16 *(You are the light ... Let your light so shine)*
> Matthew 7:21, 24–29 *(Like a wise man who built his house upon the rock)*
> John 15:9–12 *(Love one another as I have loved you)*

After the Gospel, the Reader says

> The Gospel of the Lord.

People   Praise to you, Lord Christ.

A homily or other response to the Readings may follow.

The Marriage

Each member of the couple, in turn, takes the right hand of the other and says

> In the Name of God, I, *N.*, take you, *N.*, to be my *wife/husband/spouse,*
> 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.
This is my solemn vow.

The Priest may ask God's blessing on rings as follows

Bless, O Lord, these rings to be signs of the vows
by which *N.* and *N.* have bound themselves to each other;
through Jesus Christ our Lord. *Amen.*

The giver places the ring on the ring finger of the other's hand and says

N., I give you this ring as a symbol of my vow,
and with all that I am, and all that I have, I honor you,
in the Name of the Father, and of the Son,
and of the Holy Spirit [*or* in the Name of God].

Then the Celebrant joins the right hands of the couple and says

Now that *N.* and *N.* have given themselves to each other by solemn vows,
with the joining of hands and the giving and receiving of rings,
I pronounce that they are wed to one another,
in the Name of the Father, and of the Son, and of the Holy Spirit.
Those whom God has joined together let no one put asunder.

People   Amen.

The Prayers

All standing, the Celebrant says

Let us pray together in the words our Savior taught us.

People and Celebrant

Our Father, who art in heaven,
   hallowed be thy Name,
   thy kingdom come,
   thy will be done,
   on earth as it is in heaven.
Give us this day our daily bread.
And forgive us our trespasses,
   as we forgive those
   who trespass against us.
And lead us not into temptation,
   but deliver us from evil.
For thine is the kingdom,
   and the power, and the glory,
   forever and ever.
   Amen.

Our Father in heaven,
   hallowed be your Name,
   your kingdom come,
   your will be done,
   on earth as in heaven.
Give us today our daily bread.
Forgive us our sins
   as we forgive those
   who sin against us.
Save us from the time of trial,
   and deliver us from evil.
For the kingdom, the power,
   and the glory are yours
   now and for ever.
   Amen.

If Communion is to follow, the Lord's Prayer may be omitted here.

The Deacon or other person appointed reads the following prayers, to which the People respond, saying,
Amen. If there is not to be a Communion, one or more of the prayers may be omitted.

Leader	Let us pray.

Eternal God, creator and preserver of all life, author of salvation, and giver of all grace: Look with favor upon the world you have made, and for which your Son gave his life, and especially upon *N.* and *N.* whom you make one flesh in Holy Matrimony. *Amen.*

Give them wisdom and devotion in the ordering of their common life, that each may be to the other a strength in need, a counselor in perplexity, a comfort in sorrow, and a companion in joy. *Amen.*

Grant that their wills may be so knit together in your will, and their spirits in your Spirit, that they may grow in love and peace with you and one another all the days of their life. *Amen.*

Give them grace, when they hurt each other, to recognize and acknowledge their fault, and to seek each other's forgiveness and yours. *Amen.*

Make their life together a sign of Christ's love to this sinful and broken world, that unity may overcome estrangement, forgiveness heal guilt, and joy conquer despair. *Amen.*

Bestow on them, if it is your will, the gift and heritage of children, and the grace to bring them up to know you, to love you, and to serve you. *Amen.*

Give them such fulfillment of their mutual affection that they may reach out in love and concern for others. *Amen.*

Grant that all married persons who have witnessed these vows may find their lives strengthened and their loyalties confirmed. *Amen.*

Grant that the bonds of our common humanity, by which all your children are united one to another, and the living to the dead, may be so transformed by your grace, that your will may be done on earth as it is in heaven; where, O Father, with your Son and the Holy Spirit, you live and reign in perfect unity, now and for ever. *Amen.*

The Blessing of the Marriage

The People remain standing. The couple kneel, and the Priest says one of the following prayers

Most gracious God, we give you thanks for your tender love in sending Jesus Christ to come among us, to be born of a human mother, and to make the way of the cross to be the way of life. We thank you, also, for consecrating the union of two people in his Name. By the power of your Holy Spirit, pour out the abundance of your blessing upon *N.* and *N.* Defend them from every enemy. Lead them into all peace. Let their love for each other be a seal upon their hearts, a mantle about their shoulders, and a crown upon their foreheads. Bless them in their work and in their companionship; in their sleeping and in their waking; in their joys and in their sorrows; in their life and in their death. Finally, in your mercy, bring them to that table where your saints feast for ever in your heavenly home; through Jesus Christ our Lord, who with you and the Holy Spirit lives and reigns, one God, for ever and ever. *Amen.*

or this

O God, you have so consecrated the covenant of marriage that in it is represented the spiritual unity between Christ and his Church: Send therefore your blessing upon 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; through Jesus Christ our Lord, who lives and reigns with you and the Holy Spirit, one God, now and for ever. *Amen.*

The couple still kneeling, the Priest adds this blessing

God the Father, God the Son, God the Holy Spirit, bless, preserve, and keep you; the Lord mercifully with his favor look upon you, and fill you with all spiritual benediction and grace; that you may faithfully live together in this life, and in the age to come have life everlasting. *Amen.*

The Peace

The Celebrant may say to the People

The peace of the Lord be always with you.

People   And also with you.

The newly married couple then greet each other, after which greetings may be exchanged throughout the congregation.

When Communion is not to follow, the wedding party leaves the church. A hymn, psalm, or anthem may be sung, or instrumental music may be played.

At the Eucharist

The liturgy continues with the Offertory, at which the newly married couple may present the offerings of bread and wine.

Preface of Marriage 2, or of the Season

At the Communion, it is appropriate that the newly married couple receive Communion first, after the ministers.

In place of the usual postcommunion prayer, the following is said

O God, the giver of all that is true and lovely and gracious:
We give you thanks for binding us together
in these holy mysteries of the Body and Blood
of your Son Jesus Christ.
Grant that by your Holy Spirit,
N. and *N.*, now joined in Holy Matrimony,
may become one in heart and soul,
live in fidelity and peace,
and obtain those eternal joys prepared for all who love you;
for the sake of Jesus Christ our Lord. *Amen.*

As the wedding party leaves the church, a hymn, psalm, or anthem may be sung, or instrumental music may be played.

Additional Directions for
The Celebration and Blessing of a Marriage 2

If Banns are to be published, the following form is used

> I publish the Banns of Marriage between *N. N.* of_____and *N. N.* of_____.

> If any of you know just cause why they may not be joined together in Holy Matrimony, you are bidden to declare it. This is the first [*or* second, *or* third] time of asking.

The Celebration and Blessing of a Marriage (2) may be used with any authorized liturgy for the Holy Eucharist. This service then replaces the Ministry of the Word, and the Eucharist begins with the Offertory.

After the Declaration of Consent, if there is to be a giving in marriage, or presentation, the Celebrant asks,

> Who presents [gives] these two people to be married to each other?

The appropriate answer is, "I do." If more than one person responds, they do so together.

For the Ministry of the Word it is fitting that the couple to be married remain where they may conveniently hear the reading of Scripture. They may approach the Altar, either for the exchange of vows, or for the Blessing of the Marriage.

It is appropriate that all remain standing until the conclusion of the Collect. Seating may be provided for the wedding party, so that all may be seated for the Lessons and the homily.

The Apostles' Creed may be recited after the Lessons, or after the homily, if there is one.

When desired, some other suitable symbol of the vows may be used in place of the ring.

At the Offertory, it is desirable that the bread and wine be presented to the ministers by the newly married persons. They may then remain before the Lord's Table and receive Holy Communion before other members of the congregation.

The Witnessing and Blessing of a Marriage

Concerning the Service

This rite is appropriately celebrated in the context of the Holy Eucharist and may take place at the principal Sunday Liturgy. This rite then replaces the Ministry of the Word. A bishop or priest normally presides. Parallel texts from *Enriching Our Worship 1* are included as options for elements of this rite.

At least one of the couple must be a baptized Christian, and the marriage shall conform to the laws of the state and canons of this church.

Two or more presenters, who may be friends, parents, family members, or drawn from the local assembly, may present the couple to the presider and the assembly.

As indicated in the opening address, the consent, and the blessing of the rings, the rite may be modified for use with a couple who have previously made a lifelong commitment to one another.

The Witnessing and Blessing of a Marriage

The Word of God

Gathering

The couple joins the assembly.

A hymn of praise, psalm, or anthem may be sung, or instrumental music may be played. The

Presider says the following, the People standing

Presider	Blessed be God: Father, Son, and Holy Spirit.
People	Blessed be God, now and for ever. Amen.

In place of the above may be said

Presider	Blessed be the one, holy, and living God.
People	Glory to God for ever and ever.

From Easter Day through the Day of Pentecost

Presider	Alleluia. Christ is risen.
People	The Lord is risen indeed. Alleluia.

In place of the above may be said

Presider	Alleluia. Christ is risen.
People	Christ is risen indeed. Alleluia.

Then may be said

Presider	Beloved, let us love one another,
People	For love is of God.
Presider	Whoever does not love does not know God,
People	For God is love.
Presider	Since God so loves us,
People	Let us love one another.

The Presider may address the assembly in these words

> Dear friends in Christ,   *or*   Dearly beloved,
> in the name of God and the Church
> we have come together today with *N. N.* and *N. N.*,
> to witness the vows they make,
> committing themselves to one another

in marriage [*according to the laws of the state [or civil jurisdiction of X*].
Forsaking all others,
they will bind themselves to one another
in a covenant of mutual fidelity and steadfast love,
remaining true to one another in heart, body, and mind,
as long as they both shall live.

The lifelong commitment of marriage
is not to be entered into lightly or thoughtlessly,
but responsibly and with reverence.
Let us pray, then, that God will give them the strength
to remain steadfast in what they vow this day.
Let us also pray for the generosity
to support them in the commitment they undertake
and for the wisdom to see God at work in their life together.

Or this, for those who have previously made a lifelong commitment to one another

Dear friends in Christ,   *or*   Dearly beloved,
in the name of God and the Church
we have come together today with *N. N.* and *N. N.*
to witness the sacred vows they make this day
as they are married
[*according to the laws of the state or civil jurisdiction of X*],
and reaffirm their commitment to one another.
Forsaking all others,
they will renew their covenant of mutual fidelity and steadfast love,
remaining true to one another in heart, body, and mind,
as long as they both shall live.

Let us pray, then, that God will give them the strength
to remain steadfast in what they vow this day.
Let us also pray for the generosity
to support them in the commitment they undertake,
and for the wisdom to see God at work in their life together.

The Collect of the Day

Presider   The Lord be with you.   *or*   God be with you.
People   And also with you.
Presider   Let us pray.

The Presider says one of the following Collects

God of abundance:
assist by your grace *N.* and *N.*,
whose covenant of love and fidelity we witness this day.
Grant them your protection, that with firm resolve
they may honor and keep the vows they make;
through Jesus Christ our Savior,

who lives and reigns with you in the unity of the Holy Spirit, one
God, for ever and ever. *Amen.*

or this

Almighty and everliving God:
look tenderly upon *N.* and *N.*,
who stand before you in the company of your Church.
Let their life together bring them great joy.
Grant them so to love selflessly and live humbly,
that they may be to one another and to the world
a witness and a sign of your never-failing love and care;
through Jesus Christ your Son our Lord,
who lives and reigns with you and the Holy Spirit,
one God, to the ages of ages. *Amen.*

or this

O God, faithful and true,
whose steadfast love endures for ever:
we give you thanks for sustaining *N.* and *N.* in the life they share
and for bringing them to this day.
Nurture them and fill them with joy in their life
together, continuing the good work you have begun in
them;
and grant us, with them, a dwelling place eternal in the heavens
where all your people will share the joy of perfect love,
and where you, with the Son and the Holy Spirit, live and reign,
one God, now and for ever. *Amen.*

or this, for those who bring children

Holy Trinity, one God,
three Persons perfect in unity and equal in majesty:
Draw together with bonds of love and affection
N. and *N.*, who with *their families*
seek to live in harmony and forbearance all their days,
that their joining together will be to us
a reflection of that perfect communion
which is your very essence and life,
O Father, Son, and Holy Spirit,
who live and reign in glory everlasting. *Amen.*

The Lessons

The people sit. Then one or more of the following passages of Scripture is read. If the Holy Communion is to be celebrated, a passage from the Gospels always concludes the Readings. When the blessing is celebrated in the context of the Sunday Eucharist, the Readings of the Sunday are used, except with the permission of the Bishop.

Ruth 1:16–17
1 Samuel 18:1b, 3; 20:16–17; 42a;
    or 1 Samuel 18:1–4

Ecclesiastes 4:9–12
Song of Solomon 2:10–13; 8:6–7
Micah 4:1–4

Romans 12:9–18   Ephesians 3:14–21
1 Corinthians 12:31b–13:13   Colossians 3:12–17
2 Corinthians 5:17–20   1 John 3:18–24
Galatians 5:14, 22–26   1 John 4:7–16, 21

When a biblical passage other than one from the Gospels is to be read, the Reader announces it with these words

Reader   A Reading from_____.

After the Reading, the Reader may say

           The Word of the Lord.
    or   Hear what the Spirit is saying to God's people.
    or   Hear what the Spirit is saying to the Churches.

People   Thanks be to God.

Between the Readings, a psalm, hymn, or anthem may be sung or said. Appropriate psalms are Psalm 65, Psalm 67, Psalm 85:7–13, Psalm 98, Psalm 100, Psalm 126, Psalm 127, Psalm 133, Psalm 148, and Psalm 149:1–5.

Appropriate passages from the Gospels are

Matthew 5:1–16   John 15:9–17
Mark 12:28–34   John 17:1–2, 18–26
Luke 6:32–38

All standing, the Deacon or Priest reads the Gospel, first saying

           The Holy Gospel of our Lord Jesus Christ according to_____.
    or   The Holy Gospel of our Savior Jesus Christ according to_____.

People   Glory to you, Lord Christ.

After the Gospel, the Reader says

           The Gospel of the Lord.
People   Praise to you, Lord Christ.

The Sermon

The Witnessing of the Vows and the Blessing of the Covenant

The couple comes before the assembly. If there is to be a presentation, the presenters stand with the couple, and the Presider says to them

Presider   Who presents *N.* and *N.*, as they seek the blessing of God and the Church on their love and life together?
Presenters   We do.
Presider   Will you love, respect, and pray for *N.* and *N.*, and do all in your power to stand with them in the life they will share?
Presenters   We will.

The Presider then addresses the couple, saying

           N. and *N.*, you have come before God and the Church to exchange *and renew* solemn vows

with one another and to ask God's blessing.

The Presider addresses one member of the couple, saying

Presider	*N.*, do you freely and unreservedly offer yourself to *N.?*
Answer	I do.
Presider	Will you *continue to* live together in faithfulness and holiness of life as long as you both shall live?
Answer	I will, with God's help.

The Presider addresses the other member of the couple, saying

Presider	*N.*, do you freely and unreservedly offer yourself to *N.?*
Answer	I do.
Presider	Will you *continue to* live together in faithfulness and holiness of life as long as you both shall live?
Answer	I will, with God's help.

The assembly stands, the couple faces the People, and the Presider addresses them, saying

Presider	Will all of you gathered to witness these vows do all in your power to uphold and honor this couple in the covenant they make?
People	We will.
Presider	Will you pray for them, especially in times of trouble, and celebrate with them in times of joy?
People	We will.

The Prayers

The Presider then introduces the prayers

Presider	Then let us pray for *N.* and *N.* in their life together and for the concerns of this community.

A Deacon or another leader bids prayers for the couple.

Prayers for the Church and for the world, for the concerns of the local community, for those who suffer or face trouble, and for the departed are also appropriate. If the rite takes place in the principal Sunday worship of the congregation, the rubric   concerning the Prayers of the People on page 359 of the Book of Common Prayer is followed.

Adaptations or insertions may be made to the form that follows. A bar in the margin indicates a bidding that may be omitted.

Leader	For *N.* and *N.,* seeking your blessing and the blessing of your holy people; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.
Leader	For a spirit of loving-kindness to shelter them all their days; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.
Leader	For friends to support them and communities to enfold them; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For peace in their home and love in their family; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For the grace and wisdom to care for the children you entrust to them [*or* may entrust to them]; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For the honesty to acknowledge when they hurt each other, and the humility to seek each other's forgiveness and yours; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For the outpouring of your love through their work and witness; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For the strength to keep the vows each of us has made; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

The leader may add one or more of the following biddings

Leader	For all who have been reborn and made new in the waters of Baptism; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For those who lead and serve in communities of faith; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For those who seek justice, peace, and concord among nations; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For those who are sick or suffering, homeless or poor; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For victims of violence and those who inflict it; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

Leader	For communion with all who have died [especially those whom we remember this day:_____]; Loving God, *or* Lord, in your mercy,
People	Hear our prayer.

The Presider concludes the Prayers with the following or another appropriate Collect

> Giver of every gift, source of all goodness,
> hear the prayers we bring before you for *N.* and *N.,* who
> seek your blessing this day.
> Strengthen them as they share in the saving work of Jesus, and
> bring about for them and for all you have created
> the fullness of life he promised,
> who now lives and reigns for ever and ever. *Amen.*

If the Eucharist is to follow, the Lord's Prayer is omitted here.

Leader   As our Savior Christ has taught us,
we now pray,

People and Leader   Our Father in heaven,
hallowed be your Name,
   your kingdom come,
   your will be done,
   on earth as in heaven.
Give us today our daily bread.
Forgive us our sins
   as we forgive those
   who sin against us.
Save us from the time of trial,
   and deliver us from evil.
For the kingdom, the power,
   and the glory are yours,
   now and for ever. Amen.

And now, as our Savior Christ has taught us,
we are bold to say,
Our Father, who art in heaven,
hallowed be thy Name,
   thy kingdom come,
   thy will be done,
   on earth as it is in heaven.
Give us this day our daily bread.
And forgive us our trespasses,
   as we forgive those
   who trespass against us.
And lead us not into temptation,
   but deliver us from evil.
For thine is the kingdom,
   and the power, and the glory,
   for ever and ever. Amen.

The Marriage

The People sit. The couple stands, facing the Presider.

Presider   *N.* and *N.*, I invite you now, illumined by the Word of God and strengthened by the prayer of this community, to make your covenant before God and the Church.

Each member of the couple, in turn, takes the hand of the other and says

> In the name of God,
> I, *N.*, give myself to you, *N.*, and take you to myself.
> I will support and care for you by the grace of God:
> in times of sickness, in times of health.
> I will hold and cherish you in the love of Christ:
> in times of plenty, in times of want.
> I will honor and love you with the Spirit's help:
> in times of anguish, in times of joy,
> forsaking all others, as long as we both shall live.
> This is my solemn vow.

or this

> In the name of God,
> I, *N.*, give myself to you, *N.*, and take you to myself.
> I will support and care for you:
> in times of sickness, in times of health.
> I will hold and cherish you:
> in times of plenty, in times of want.
> I will honor and love you:
> in times of anguish, in times of joy,
> forsaking all others, as long as we both shall live.
> This is my solemn vow.

If rings are to be exchanged, they are brought before the Presider, who prays using the following words

> Let us pray.

> Bless, O God, these rings
> as signs of the enduring covenant
> *N.* and *N.* have made with each other,
> through Jesus Christ our Lord. *Amen.*

The two people place the rings on the fingers of one another, first the one, then the other, saying

> *N.,* I give you this ring as a symbol of my vow,
> and with all that I am, and all that I have, I honor you,
> in the name of God.   *or*   in the name of the Father, and of the Son,
> and of the Holy
> Spirit.

If the two have previously given and worn rings as a symbol of their commitment, the rings may be blessed on the hands of the couple, the Presider saying

> Let us pray.

> By the rings which they have worn, faithful God,

> *N.* and *N.* have shown to one another and the world
> their love and faithfulness.
> Bless now these rings, that from this day forward
> they may be signs of the vows *N.* and *N.* have exchanged
> in your presence and in the communion of your Church,
> through Christ our Lord. *Amen.*

Pronouncement

The Presider joins the right hands of the couple and says

> Now that *N.* and *N.* have exchanged vows of love and fidelity
> in the presence of God and the Church,
> I pronounce that they are married
> [according to the laws of the state *or* civil jurisdiction of *X*].
> and bound to one another
> as long as they both shall live. *Amen.*

Blessing of the Couple

As the couple stands or kneels, the Presider invokes God's blessing upon them, saying

> Let us pray.

> Most gracious God,
> we praise you for the tender mercy and unfailing
> care revealed to us in Jesus the Christ
> and for the great joy and comfort bestowed upon
> us in the gift of human love.
> We give you thanks for *N.* and *N.,*
> and the covenant of faithfulness they have made.
> Pour out the abundance of your Holy Spirit upon them.
> Keep them in your steadfast love;
> protect them from all danger;
> fill them with your wisdom and peace;
> lead them in holy service to each other and the world.

> *The Presider continues with one of the following*
> God the Father,
> God the Son,
> God the Holy Spirit,
> bless, preserve, and keep you
> and mercifully grant you rich and boundless grace,
> that you may please God in body and soul.
> God make you a sign of the loving-kindness and steadfast fidelity
> manifest in the life, death, and resurrection of our Savior,
> and bring you at last to the delight of the heavenly banquet,
> where he lives and reigns for ever and ever. *Amen.*

> *or this*
> God, the holy and undivided Trinity,
> bless, preserve, and keep you,

and mercifully grant you rich and boundless grace,
that you may please God in body and soul.
God make you a sign of the loving-kindness and steadfast fidelity
manifest in the life, death, and resurrection of our Savior,
and bring you at last to the delight of the heavenly banquet,
where he lives and reigns for ever and ever. *Amen.*

The Peace

The Presider bids the Peace.

Presider The peace of the Lord be always with you.
People And also with you.

In place of the above may be said

Presider The peace of Christ be always with you.
People And also with you.

The liturgy continues with the Holy Communion. When the Eucharist is not celebrated, the Presider blesses the people. The Deacon, or in the absence of a Deacon, the Priest, dismisses them.

At the Eucharist

The liturgy continues with the Offertory, at which the couple may present the offerings of bread and wine.

The following proper preface may be said

Because in the giving of two people to each other in faithful love
you reveal the joy and abundant life you share
with your Son Jesus Christ and the Holy Spirit.

The following postcommunion prayer may be said

God our strength and joy,
we thank you for the communion of our life together,
for the example of holy love that you give us in *N.* and *N.*,
and for the Sacrament of the Body and Blood
of our Savior Jesus Christ.
Grant that it may renew our hope
and nourish us for the work you set before us
to witness to the presence of Christ in the world,
through the power of your Spirit,
and to the glory of your Name. Amen.

The Blessing of a Civil Marriage 2

The rite begins as prescribed for celebrations of the Holy Eucharist, using the Collect and Lessons appointed in the Marriage   service.

After the Gospel (and homily), the couple stand before the Celebrant, who addresses them in these or similar words

> 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.

The Celebrant then addresses one member of the couple, then the other, saying

> N., you have taken N. to be your *wife/husband/spouse.* Do you promise to love *her/him*, comfort *her/him*, honor and keep *her/him*, in sickness and in health, and, forsaking all others, to be faithful to *her/him* as long as you both shall live?

Answer   I do.

The Celebrant then addresses the congregation, saying

> Will you who have witnessed these promises do all in your power to uphold these two persons in their marriage?

People   We will.

If rings are to be blessed, the members of the couple extend their hands toward the Priest [or Bishop], who says

> Bless, O Lord, these rings to be signs of the vows by which N. and N. have bound themselves to each other; through Jesus Christ our Lord. *Amen.*

The Celebrant joins the right hands of the couple and says

> Those whom God has joined together let no one put asunder.

People   Amen.

The service continues with The Prayers on page xxx.

An Order for Marriage 2

If it is desired to celebrate a marriage otherwise than as provided on page 423 of The Book of Common Prayer, or in the trial-use liturgies "The Witnessing and Blessing of a Marriage" or "The Celebration and Blessing of a Marriage 2," this Order is used.

Normally, the celebrant is a priest or bishop. Where permitted by civil law, and when no priest or bishop is available, a deacon may function as celebrant, but does not pronounce a nuptial blessing.

The laws of the State and the Canons of this Church having been complied with, the couple, together with their witnesses, families, and friends assemble in the church or in some other convenient place.

1. The teaching of the Church concerning Holy Matrimony, as it is declared in the formularies and Canons of this Church, is briefly stated.

2. The intention of the couple to enter the state of matrimony, and their free consent, is publicly ascertained.

3. One or more Readings, one of which is always from Holy Scripture, may precede the exchange of vows. If there is to be a Communion, a Reading from the Gospel is always included.

4. The vows are exchanged, using the following form In the Name of God,

> I, *N.*, take you, *N.*, to be my
> *wife/husband/spouse,* 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.
> This is my solemn vow.

or this

> I, *N.*, take thee *N.*, to my wedded
> *wife/husband/spouse,* 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,
> till death us do part, according to God's holy
> ordinance; and thereto I plight [*or* give] thee my
> troth.

5. The Celebrant declares the union of the couple, in the Name of the Father, and of the Son, and of the Holy Spirit.

6. Prayers are offered for the couple, for their life together, for the Christian community, and for the world.

7. A priest or bishop pronounces a solemn blessing upon the couple.

8. If there is no Communion, the service concludes with the Peace, the couple first greeting each other. The Peace may be exchanged throughout the assembly.

9. If there is to be a Communion, the service continues with the Peace and the Offertory. The Holy Eucharist may be celebrated either according to Rite One or Rite Two, or according to the Order on page 401 of the Book of Common Prayer 1979.

Prefaces for Marriage

Note: The following Proper Preface is proposed for trial use as an addition to the Prefaces for Rite I, BCP p. 349.

Marriage 2

Because in the marriage of two people in faithful love thou dost reveal unto us the joy and abundant life thou sharest with thy Son Jesus Christ and the Holy Ghost.

Note: The following Proper Preface is proposed for trial use as an addition to the Prefaces for Rite II, BCP p. 381.

Marriage 2

Because in the marriage of two people in faithful love you reveal the joy and abundant life you share with your Son Jesus Christ and the Holy Spirit.

An Outline of the Faith

Note: These paragraphs are proposed for trial use as an amendment of the section on Holy Matrimony in An Outline of the Faith (also known as the Catechism), BCP p. 861.

Q.   What is Holy Matrimony?

A.   Holy Matrimony is Christian marriage, in which two people enter into a life-long union, make their vows before God and the Church, and receive the grace and blessing of God to help them fulfill their vows.

Q.   What is required of those to be married?

A.   It is required of those to be married that at least one member of the couple be baptized and that they have been instructed that Christian marriage is an unconditional, mutual, exclusive, faithful and lifelong commitment intended for the couple's mutual joy, for the help and comfort given to each other in prosperity and adversity, and when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God.

III. Essays: Christian Perspectives on Marriages and Family Life Today

prepared by the

Task Force on the Study of Marriage 2015-2018

Contents

Introduction: Christian Perspectives on Marriages and Family Life Today

Six years ago, the 2012 General Convention of the Episcopal Church created a Task Force on the Study of Marriage charged with exploring "biblical, theological, historical, liturgical, and canonical dimensions of marriage," and to "consider issues raised by changing societal and cultural norms and legal structures" (Resolution 2012-A050). The task force produced several essays, including one on "Changing Trends and Norms in Marriages." In its executive summary, the task force reported:

> 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.

The task force also explored "differences in marriage trends among groups identified by race and ethnicity: African Americans, Hispanics and Latinos, Native Americans, and Asian Americans."[1]

The 2015 General Convention called for an expanded task force to continue this work, including further exploration of "those contemporary trends and norms identified by the Task Force on the Study of Marriage in the previous triennium," and to "explore biblical, theological, moral, liturgical, cultural, and pastoral perspectives on these matters, and develop written materials about them which represent the spectrum of understanding in our Church and which include responses from theologians, ethicists, pastors, liturgists, social scientists, and educators who are not members of the expanded Task Force, and whose perspectives represent the spectrum of understandings on these matters in our Church" (Resolution 2015-A037).

The task force has responded to this charge by producing a series of short essays that are intended to invite reflection and conversation about marriage, intimate human relationships, and human sexuality from a Christian perspective. The essays in this series build on the essays produced by the earlier task force, and they rely on the data in the essay "Changing Trends and Norms in Marriages."

In summer 2017, the task force sent first drafts of these essays to scholars, pastors, and educators and invited responses. The twenty replies we received informed the final revisions of the essays. A final essay lists the respondents and summarizes the critiques and suggestions that were not incorporated into the essays.

The task force also circulated a survey in fall 2016 that invited Episcopalians to tell us about their experiences of marriage and other intimate human relationships. We have incorporated a few of these responses in the essays to illustrate some of the realities of marriage, singleness, and family life in our contemporary contexts.

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[1] Introduction, Appendix 1: Essays on Marriage, in Report of the Task Force on the Study of Marriage to the 78ᵗʰ General Convention (Reports to General Convention, 1976-2015, Archives of the Episcopal Church), p. 12, https://www.episcopalarchives.org/e-archives/gc_reports/reports/2015/bb_2015-R044.pdf (accessed 8/19/17). Essay 7, "Changing Trends and Norms in Marriages," is on pp. 88-98 of the report. The essays are included below in their entirety.

We encourage congregations and other groups to discuss these essays. Several questions for reflection follow each essay, and a bibliography offers resources for further study.

Over the centuries, Anglicans have developed theology that is rooted in Scripture, draws upon the breadth of Christian tradition, and is in dialogue with its contemporary context. These brief essays seek to do the same. They offer a foundation for a Christian understanding of human relationships, and they explore how we understand God to be at work in the complexity of intimate human relationships, including marriage, in our time, in the various contexts in which the Episcopal Church is located today. We invite Episcopalians to join us in this theological reflection, seeking to understand the blessings of lifelong committed relationships and to discern how to respond pastorally to individuals and couples in the midst of changing social and cultural norms.

Biblical and Theological Foundations for Relationships

Even before we are born, we are in relationship, as God knits us together in our mother's womb (*Psalm 139:13*). We grow and develop in a network of relationships, including but not limited to family, friendship, and marriage. Because we are created in the image of God (*Genesis 1:27-28*), human beings are created for relationship.

Christians understand ourselves to be drawn into relationship with God and with one another through Christ. Faith in the incarnate Word awakens us to the promise of right relationship that is God's desire for all humankind.

"The heart of Christian faith is the encounter with the God of Jesus Christ who makes possible both our union with God and communion with each other. In this encounter God invites people to share in divine life and grace through Jesus Christ by the power of the Holy Spirit; at the same time, we are called to live in new relationship with one other, as we are gathered together by the Spirit into the body of Christ."[1]

God's love is revealed in Jesus, the Word who became flesh and lived among us (*John 1:14*). From Jesus, we learn that loving God with our whole being is integrally connected with loving our neighbor as ourselves (*Matthew 22:36-40*). In his life and teaching, Jesus taught and embodied the love of neighbor commanded in Jewish Law (*Leviticus 19:18*). Jesus enacted God's self-giving love, for example, by feeding the multitudes (*Matthew 15:32-38*). After taking on the role of a servant and washing the feet of his disciples (*John 13:1-15*), Jesus then gave his disciples a new commandment: to love one another as he loved them (*John 13:34-35*).

Loving one another is not limited to family or the Christian community, as the Baptismal Covenant in the 1979 *Book of Common Prayer* indicates: "Will you seek and serve Christ in *all persons*, loving your

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[1] Catherine Mowry LaCugna, "The Practical Trinity," *Christian Century* (July 15-22, 1992), 679.

neighbor as yourself?" *(p. 305)* Love of neighbor requires concern for the whole human family: "Will you strive for justice and peace among *all people,* and respect the dignity of *every human being*?" *(p. 305)* The Baptismal Covenant thus calls us to a way of life that is not only loving but also liberating and life-giving.

We make these baptismal promises in response to the affirmation of faith (the Apostles' Creed) that proclaims God's mission of creating, redeeming, and sanctifying love for the world. Through baptism, we become members of a community of faith that recognizes God at work in the world, from the beginning of creation to the promised new creation, a community that extends through time as the communion of saints. Baptism signifies God's claim on us as beloved children of God and marks us as Christ's own *(BCP p. 308)*. Our participation in baptism and eucharist sustains us in our relationships with people and communities throughout the world, and with all creation.[2]

While Christians strive to love as Christ loved us, following the way of Jesus is difficult. All too often Christians fall short as we wrestle with the evil powers of this world and our own sinful desires *(BCP p. 302)*, as the Baptismal Covenant recognizes: "Will you persevere in resisting evil, and whenever you fall into sin, repent and return to the Lord?" *(BCP p. 304)*

Like Christians today, the earliest Christian communities struggled to fulfill Jesus' new commandment of love. Writing to the Christian community in Corinth, a community that was divided among themselves *(I Corinthians 1:11-12),* the apostle Paul exhorted them to recognize their unity in the body of Christ through baptism *(I Corinthians 12:12-13)*, then called them to love one another. In a passage frequently read at wedding ceremonies, though originally intended for the entire Christian community at Corinth, Paul explained, "Love is patient; love is kind; love is not envious or boastful or arrogant or rude. It does not insist on its own way; it is not irritable or resentful; it does not rejoice in wrongdoing, but rejoices in the truth. It bears all things, believes all things, hopes all things, endures all things." *(I Corinthians 13:4-7)*

In his letter to the Philippians, Paul made clear that our love for one another is to be a selfless love that is rooted in Christ's incarnation. "Be of the same mind, having the same love, being in full accord and of one mind. Do nothing from selfish ambition or conceit, but in humility regard others as better than yourselves. Let each of you look not to your own interests, but to the interests of others. Let the same mind be in you that was in Christ Jesus, who… emptied himself… being born in human likeness." *(Philippians 2:2-7)* God's self-giving love, revealed most especially in the incarnation, not only casts down the mighty, it also lifts up the lowly *(The Song of Mary, Luke 1:46-55;* see also *The Song of Hannah, I Samuel 2:1-10).*

It is evident in Jewish teaching that this love extends beyond our family and nearest neighbors. The Law of Moses states, "You also shall love the stranger, for you were strangers in the land of Egypt" *(Deuteronomy 10:19),* a principle that Jesus extended in radical ways when he redefined his family not as those with whom he shared ties of blood but as those "who hear the word of God and do it" *(Luke*

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[2] "Faith, Hope, and Love: Theological Resources for Blessing Same-Sex Relationships," in *"I Will Bless You, and You Will Be a Blessing,"* Liturgical Resources 1, revised and expanded edition (New York: Church Publishing, Inc., 2015), 39-43.

8:21, also Matthew 12:50 and Mark 3:35) and taught that those who would be children of God must care at great personal cost for those whom they have been taught are unworthy of such attention *(Luke 10:25-37).*

Like all human beings, Christians do not always live in the way of love. Striving for power or position, jealousy, factionalism, destructive uses of substances, spiritual manipulation, and loveless or indiscriminate sexual behavior are just a few of the ways that relationships are distorted and sinful. When Christians fail to live in the way of love, they can seek forgiveness from one another, and from God, an essential part of baptismal living. Christians are able to acknowledge their faults and seek forgiveness through Jesus Christ, who makes known God's love and offers forgiveness of sins.

By the power of the Holy Spirit, God continues to be present among us, saving us from sin, seeking communion with us and all creation, drawing us toward the promised new creation. The fruit of the Spirit, the apostle Paul tells us, is "love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control" *(Galatians 5:22-23).* Those who live by the Spirit grow in holiness of life as they embody these qualities in their relationships, including marriage and family.

QUESTIONS FOR CONSIDERATION

1) Is there anything of Jesus' own character or teachings that has taught you something about "right relationship" in your life?

2) The church speaks of "communion with God and one another." In the Eucharist, do you sense a communion with God and other people? If so, what is that like? How has this affected how you are in relationship with others?

3) We are urged to "love and serve one another as Christ loved and served us." Can you think of times when Christ's example of love and service affected your love and service to others?

4) How have you tried to live out the Baptismal Covenant's call to "resist evil" in yourself and/or the world around you?

5) Do you sense a connection between God's forgiveness of you and your forgiving or being forgiven by others in relationship? If so, what is that like?

Culture, Ethnicity, and Marriage

Resolution 2015-A037 asked the Task Force on the Study of Marriage to "explore… differences in marriage patterns between ethnic and racial groups."[1] An early effort to summarize data on marriage patterns among differing racial and ethnic groups ran into two insurmountable problems. First was the impossibility of including all the racial and ethnic groups present in The Episcopal Church.[2] Second, and more significant, was the overwhelmingly negative response from many on the Task Force, who found that this approach reinforced harmful, offensive stereotypes. Especially in a time of increased harassment of and hate crimes against non-white persons, we believed it was irresponsible and un-Christian to add to the burden of racism that people of color bear.[3] A third important factor was that the Task Force had already addressed the data in the previous triennium. The Blue Book report of 2015 discussed varying relationship patterns among different groups throughout The Episcopal Church.[4] Therefore, this essay takes up what was largely unexamined in 2015: the importance of understanding power and culture. We seek to offer the Church a tool that could be valuable to couples and to clergy ministering with them, and so we turned to the need for cultural competency among all people interacting with couples, including the partners themselves.

We start with the simple definition found in the Merriam-Webster dictionary. Culture is "the integrated pattern of human knowledge, belief, and behavior that depends upon the capacity for learning and transmitting knowledge to succeeding generations." Culture is dynamic and fluid; elders and peers transmit culture to us across the span of our lifetimes. For our purposes, culture shapes the norms and expectations of individuals, couples, and families. Culture is one more element to consider during premarital counseling. A focus on culture might expand the work done with couples with respect to their family of origin. For couples in an interracial or inter-cultural relationship, and for families formed by interracial adoption, the development of cultural competency is both a product of the relationship and vital to its strength. A Swedish woman married to an American man says:

> I've been married to the same man for 48½ years (½ is important according to my granddaughter), and we've had our ups and downs––some of the downs as a result of my

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[1] Resolution 2015-A037, "Appoint an Expanded Task Force on the Study of Marriage," https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2015-A037 (accessed March 30, 2017). Some of the racial and ethnic differences in marriage patterns are explored in "Essay Seven: Changing Trends and Norms in Marriages," *Essays on Marriage*, appendix to the Report of the Task Force on the Study of Marriage to the 78th General Convention (2015), 575-78, https://www.episcopalarchives.org/e-archives/gc_reports/reports/2015/bb_2015-R044.pdf (accessed March 30, 2017).

[2] Our denomination consists of congregations in more than a dozen countries, and the Task Force's best efforts to solicit input from the whole Episcopal Church, in all its geographical, racial, ethnic, and cultural diversity, unfortunately did not yield responses from Province IX.

[3] Southern Poverty Law Center, "Hate Groups Increase for Second Consecutive Year as Trump Electrifies Radical Right," February 15, 2017, https://www.splcenter.org/news/2017/02/15/hate-groups-increase-second-consecutive-year-trump-electrifies-radical-right (accessed March 25, 2017).

[4] Task Force on the Study of Marriage, Blue Book 2015, pp. 93ff, https://extranet.generalconvention.org/staff/files/download/12485.pdf (accessed September 26, 2017).

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massive culture shock when arriving in the US as a newly-wed in 1968....The only person I could be myself with was my husband...[5]

Everyone is part of a culture; it conditions what we think of as normal. For those who are part of a majority culture, their distinctive cultural identity may be unexamined, and all other cultures are thought of as "abnormal" or "other." For some it may take time and encouragement to see and name their cultural heritage, especially for those who are accustomed to thinking of culture as something other people have, or who have limited experience with a diversity of cultures. Traveling to a different region or country can help us to see our own culture, as we recognize that "they do things differently here." By encouraging couples and clergy to explore their cultures, we hope our work will be useful across all racial and ethnic groups.

Every marriage is a complex interplay of culture, family systems, and individual personalities. We offer these questions for couples to consider, for clergy to use when preparing couples for marriage or counseling married couples––really, for anyone to use in a variety of contexts in deepening their own cultural competency.

QUESTIONS FOR CONSIDERATION

1) What would you name as your culture or ethnicity? What makes you glad to be a part of that culture or ethnicity? What are the challenges of that culture or ethnicity? In what ways is your culture or ethnicity the same as that of your spouse, and in what ways is it different?

2) What norms and expectations of family relationship and marriage are familiar to you from your own family of origin, geography, and culture or ethnicity?

3) What have you learned from your culture or ethnicity about gender roles? Money? Sexuality? Raising children? Religion?

4) How does racism––the intersection of prejudice and power––affect your daily life? What advantages have you received as a result of your race or ethnicity, and how does that affect your daily life? If you are married or preparing for marriage, what support would you welcome from your spouse as you live with racism, and what would you resist? If your spouse is from a different race or ethnicity, what do they need to know and understand to keep you and themselves safe? How does your experience of power in your cultural context compare to that of your partner? What do you need your spouse to know about your experience of power or authority?

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[5] This story is taken from narratives obtained through a survey on relationships circulated throughout The Episcopal Church in fall, winter, and spring of 2016-17 by the Task Force on the Study of Marriage. We were moved by these glimpses of relationship, and they have allowed writers of this series of essays to add a personal context. Through stories we are led to deeper truths about relationship and a profound appreciation of each writer's dignity. We understand that each story is a glimpse of one person's experience and realize that there are many stories to tell.

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5) In your cultural or ethnic context, what role do parents expect to play in their grown child's marriage? Do your parents expect you to care for them and/or live with them as they grow older? If you are married or preparing for marriage, how involved will your parents be in the lives of your children? Are there special roles that family members are expected to play, either in your wedding ceremony or in your life as a couple?

6) How is emotion communicated in your culture or ethnicity?

7) How is conflict addressed, or not addressed, in your culture or ethnicity?

8) What attitudes towards alcohol, licit or illicit substance use, gambling, etc. have you absorbed from your culture or ethnicity?

9) What role do honor and shame play in your culture or ethnicity? What's the worst thing that could happen to a person of your culture or ethnicity?

10) How are holidays celebrated in your culture or ethnicity? What cultural or ethnic traditions are most important to you?

11) In what ways are the norms of your culture or ethnicity congruent with Christian teachings? Where is your culture or ethnicity in conflict with Christianity, and how do you navigate those areas?

12) What would a person need to know about your culture or ethnicity to understand you?

13) What gifts might your culture or ethnicity give to your friendships and relationships? To your marriage? To your spouse? To your children?

14) What parts of your cultural or ethnic norms do you wish to keep in your life together? What parts would you like to change or leave behind?

Householding

For Christians, the Holy Trinity is an important foundation for understanding relationships. In the Trinity, each member gives to the others and receives from them, creating a dynamic whole that honors and upholds the unique personhood of each. This ideal of community is reflected in the real relationships of human households in which our shared lives, loves, and responsibilities create an atmosphere that is sacred and sanctifying.[1]

In a household that manifests the holiness of the triune God, two or more people join in a common life in which they practice love of neighbor.[2] By sharing space, meals, fellowship, labor, and love, and through the behaviors fostered by such sharing, including mutual service, hospitality, mercy, kindness, gentleness and self-control, the shared life can foster mutual affection and generosity of spirit.[3] As members of a household participate in giving and receiving love with one another, they may grow in the love of God, and their love may extend beyond their household.

Households also provide opportunity to practice forgiveness and reconciliation. In the nearness of a household, its members—finite, imperfect, sinful human creatures—inevitably fail from time to time to treat each other with the love of neighbor that God require. For example, the marriage service in the 1979 Book of Common Prayer includes this prayer for the couple: "Give them grace, when they hurt each other, to recognize and acknowledge their fault, and to seek each other's forgiveness and yours" *(p. 429)*. Bishop Thomas Breidenthal cautions that this prayer does not condone physical or emotional abuse but rather is concerned with "ordinary, everyday unpleasantness: the petty, unkind acts we commit even against those we love, simply because we are self-centered and sinful."[4] By seeking and offering forgiveness, members of a household can participate in God's mission "to restore all people to unity with God and each other in Christ" *(BCP p. 855)*.

Marriage

Christian marriage, as understood today, embodies an equality and mutual service that demonstrate the transformative power of holy householding. Expression of this can be found throughout the liturgies approved for marriage and in The Episcopal Church's teaching on marriage as laid out in the canonical Declaration of Intention signed by a couple prior to the solemnization of their marriage:

> We understand the teaching of the church that God's purpose for our marriage is for our mutual joy, for the help and comfort we will give to each other in prosperity and adversity, and, when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God. We also understand that our marriage is to be unconditional,

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[1] Thomas Breidenthal, *Christian Households* (Boston: Cowley Publications, 1997), p. 159.
[2] Some single persons identify themselves as a household. See the accompanying essay on Singleness for more on this subject.
[3] Breidenthal, *Christian Households*, pp. 1-2, 16.
[4] Thomas Breidenthal, *Sacred Unions: A New Guide to Lifelong Commitment* (Cambridge, MA: Cowley Publications, 2006), p. 101.

mutual, exclusive, faithful, and lifelong; and we engage to make the utmost effort to accept these gifts and fulfill these duties, with the help of God and the support of our community.[5] The lifelong nature of this commitment is key to the couple's continuing growth in holiness, as a man married to his wife for 33 years explains:

> In those years we have had times of liking one another and times of hating one another, times of deep and passionate lust for one another and times when the flames of passion have burned cool and low. But through it all we have remained deeply and profoundly in love with one another. This kind of lasting love is, I believe, a choice. I didn't choose to fall in love with my wife, but I have chosen to remain in love with her. Why? Because she helps me become more of the person God intended me to be. She challenges me to reach beyond what I thought I could grasp and to discover the true extent of my reach. She sees me with eyes that are not limited by my poor vision, not clouded by the pain and self-doubt that builds up in life. And being seen through her eyes allows me to achieve more than I would have without her present in my world.[6]

The church's teaching on marriage applies to all couples marrying in The Episcopal Church, including same-sex couples. After several decades of grassroots change and official action, the 2015 General Convention authorized two trial-use liturgies for marriage that can be used by any couple, same-sex or different-sex, with the permission and under the direction of the diocesan bishop. However, our church is not of one mind on this; for example, one married man comments,

> There is a significant number of people who do not believe that tradition or the Bible supports marriage between two people of the same sex. It may be appropriate for civil rights but dubious for the church. I know a priest whose vestry asked him to leave because he would not perform a same-sex marriage.

Although Episcopalians and other Christians have different theological understandings of human sexuality, including same-sex relationships, the Convention directed bishops to make provision for all couples seeking to be married in the Episcopal Church to have access to these liturgies.[7] This has allowed same-sex couples in longtime relationships to solemnize their marriages in church. A man who recently married his husband on the fifteenth anniversary of the date they first met describes their relationship:

> I understand our relationship to be God-given, and sacred. Ours is a committed, monogamous and life-long relationship based upon mutual love and respect. People who know us understand that we bring out the best in each other and those around us. In this sense we live sacramentally as a married couple symbolizing through our love for each other the love that God has for the Church and the World.

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[5] Canon I.18.4, *The Constitution and Canons of the Episcopal Church* (New York: Church Publishing, Inc., 2015).

[6] The stories found in this essay are taken from narratives contained in a survey on relationship circulated throughout The Episcopal Church in fall, winter, and spring of 2016-17 by the Task Force on the Study of Marriage. We were moved by these glimpses of relationship, and they have allowed writers of each of these essays to add a personal context. Through stories we are led to deeper truths about relationship and a profound appreciation of each writer's dignity. We understand that each story is a glimpse of one person's experience and realize that there are many stories to tell.

[7] Resolution 2015-A054, "Authorize for Trial Use Marriage and Blessing Rites Contained in 'Liturgical Resources I'," https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2015-A054.

As a "natural estate," marriage is created by the intention and vows of a couple to one another, apart from any liturgy of the Church or license by the State. The State's license provides legal protections for the couple, while in the sacramental rite of marriage, the couple make a public commitment to one another and receive the community's prayer and support as well as "the grace and blessing of God to help them fulfill their vows" (*BCP p. 861*). In addition, the Church's canonical requirements for marriage ensure that the couple is instructed "in the nature, purpose, and meaning, as well as the rights, duties, and responsibilities of marriage."[8] Thus, Christian marriage is to be recommended and affirmed.

Yet Christian marriage is not the only form of household in which participants can experience God's blessing. Moreover, abuse is never God's will, and marriage is not appropriate in relationships that are abusive or exploitative. In the realm of healthy relationships, households take many forms in addition to marriage, and commitments to love, service, and a common life come in many forms.

Cohabitation

In cohabitation, a couple form a household based on implicit or explicit promises to contribute to their common good, share responsibilities, influence one another, and ease one another's burdens. The union of household may be "for as long as we can" or "for as far as we can see." The couple may understand the arrangement as a time of discernment about marriage, as an alternative to marriage, or as a prelude to marriage, in which the partners come to know themselves as they grow in knowledge and love of another. Such cohabitation of intimate sexual partners is increasingly common, challenging the church to respond pastorally while also affirming norms for relationship.

In 2000, the General Convention acknowledged couples living in lifelong committed relationships other than marriage and identified qualities expected of these couples as well as married couples: "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."[9] These characteristics can also provide norms for the relationships of cohabiting couples who have not made a lifelong commitment to each other. A couple who make an examined choice to cohabit and seek to build a loving and life-giving relationship marked by these characteristics may experience God's blessing in their relationship.

The church might consider various pastoral and/or liturgical responses to couples who cohabit. Recognizing the number of Christian couples who live together before marriage, Adrian Thatcher proposes a pastoral approach: "to thank God for the marital values their togetherness already expresses, and to guide them to the solemnization and deepening of those values in the sacrament of Christian marriage."[10] Rosemary Radford Ruether suggests different forms of covenantal vows for sexual friendships: temporary vows, for younger cohabiting couples who are "not yet ready for

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[8] Canon I.18.3c

[9] Resolution 2000-D039, "Acknowledge Relationships Other Than Marriage and Existence of Disagreement on the Church's Teaching," https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2000-D039. The resolution also states that these same characteristics apply to other lifelong committed relationships.

[10] Adrian Thatcher, *Theology and Families* (Oxford: Blackwell Publishing, 2007), pp. 135-36.

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permanent commitment personally or economically," and life vows, for those making a lifelong commitment.[11] Michael Lawler and Todd Salzman distinguish between non-nuptial and nuptial cohabiters. For the latter group, who are committed to marry one another, Salzman and Lawler call for a process of nuptial commitment, beginning with a public betrothal ceremony, followed by "nuptial cohabitation" and eventually, a wedding ceremony.[12]

Some cohabiting couples in some legal jurisdictions do not desire any kind of church blessing of their relationship because the state may then consider them to be legally married. The church should be sensitive to this concern.

Households with Children
In a household with children the dynamics of householding take on new dimensions. Adults enter a household with one another as equals in authority, but parents and children have different levels of authority to ensure the healthy upbringing of children. Beyond these differences in authority, many aspects of a household remain the same when adults and children are involved. All can serve, love, and support in ways appropriate to their maturity and capacity. All serve the common good by their participation in the household. New depths of wonder and partnership can be revealed between parents as they partner to raise a child. Sharing roles, stepping in when the other is overwhelmed, communicating joys and concerns associated with the child — all of these open new ways for Christ to be revealed and realized in the household. At the same time raising children is hard work; all parents need the church's support and affirmation.

While the church and society have not always been supportive of same-sex couples raising children, social-science research over the past quarter century has yielded overwhelming evidence "that children of same-sex parents do not differ from those of heterosexual or single parents on a range of social and behavioral outcomes."[13] Same-sex as well as different-sex parents face similar concerns, "such as providing appropriate structure for children, while also being warm and accepting, setting limits, teaching open and honest communication, healthy conflict resolution, and monitoring of child's peer network and extracurricular activities." However, same-sex parents and their children may face challenges because of social stigma and disagreement with extended family members about the validity of the couple's relationship.[14]

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[11] Rosemary Radford Ruether, *Christianity and the Making of the Modern Family* (Boston: Beacon Press, 200), p. 215. In the course of this work the Task Force has heard a desire for a form of life vows for i) older couples who desire to form and to formalize a relationship that is monogamous, unconditional, and lifelong, but is nevertheless something different than a marriage in that it does not include the merging of property, finances, or other legal encumbrances, and for ii) couples for whom the requirement to furnish identification to obtain a marriage license could result in state penalties including deportation, because of their immigration status.

[12] Michael G. Lawler and Todd A. Salzman, "People Beginning Sexual Experience," in *The Oxford Handbook of Theology, Sexuality, and Gender*, edited by Adrian Thatcher (Oxford: Oxford University Press, 2015), pp. 566, 568-70.

[13] Robert Preidt, "'Overwhelming' Evidence That Same-Sex Parenting Won't Harm Kids," *US News and World Report*, June 26, 2015, http://health.usnews.com/health-news/articles/2015/06/26/overwhelming-evidence-that-same-sex-parenting-wont-harm-kids.

[14] Deanna Linville and Maya O'Neil, "Same Sex Parents and Their Children" (American Association for Marriage and Family Therapy), http://www.aamft.org/imis15/aamft/Content/Consumer_Updates/Same-sex_Parents_and_Their_Children.aspx.

The loving self-sacrifice associated with parenting is as true in the adoptive household as it is in every child-rearing household. Perhaps because adoption happens only when parents explicitly desire a child and pursue that good, many adoptive households bring special benefits of engagement and preparation to their child-rearing. In many of these households, children are read to more often and are encouraged more often to participate in extracurricular activities.[15]

Parenting can be especially challenging for a single parent raising one or more children. While some become single parents by choice, for others divorce or the death of a partner may result in the necessity of single-parenting. Single parents do not have the support of a partner with whom to share responsibility, and divorced parents may face particular challenges of co-parenting with a former spouse. Thus the support and affirmation of extended family and community, including the church community, becomes especially important. A great-grandmother reports:

> Of my three grandchildren and two great-grandchildren, only one was born to parents married to each other. We would have preferred that our children and grandson had made different decisions about sexual intimacy and becoming parents. But when faced with unplanned pregnancies, we chose to welcome the births and support these new families. We cherish our grandchildren and great-grandchildren, and their parents (our children and grandson) have grown as they have faced the challenges and joys of parenting.

Many families in our communities are blended, including step-parents and children from previous relationships. Blending families is often hard work, but it can also be richly rewarding, as a woman who has been married for 52 years reports:

> We raised three of his children from a previous (extremely unhappy) marriage, and two boys of our own. All have turned out to be strong, wonderful people. This marriage has been very positive and happy, and I am glad to have been married to my husband.

Insights into Householding

Living together shapes us. Whether the household is formed by marriage, cohabitation, parenting, or in some other way, such as monastic communities, roommates, or multigenerational families, the intimacies that come from close contact can create networks of trust and mutuality in which the fruit of the Spirit[16] can be known and shared.

Whatever the form of household, its members have the potential to experience God's grace in their relationships, for God follows love just as surely as love follows God. What is telling is not the type of household we consider, but its nature. Do the members willingly engage love and service? Is the preciousness of all members honored? Is the household free of promiscuity, exploitation, and abusiveness?[17] Are patience and kindness manifest? Or is the household marked by envy, boasting, arrogance, or rudeness? Do members insist on their own way? Are they irritable or resentful? Do they

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[15] Sharon Vandivere, Karin Malm, and Laura Radel, "Adoption USA: A Chartbook Based on the 2007 National Survey of Adoptive Parents" (US Department of Health and Human Services) https://aspe.hhs.gov/pdf-report/adoption-usa-chartbook-based-2007-national-survey-adoptive-parents.

[16] Galatians 5:22-23

[17] Resolution 2000-D039.

rejoice in wrongdoing, or do they rejoice in the truth?[18] No household will perfectly manifest the love of God, for surely all sin. A commitment to acknowledge occasions of hurt and to seek one another's forgiveness, and God's, is key to growth in holiness.

In the intimacy and mutual responsibility of a household, Christians have an opportunity to participate in God's self-giving love, which is demonstrated in the communion of persons in the triune God. As the members of the household practice love of neighbor, recognizing others in the household as their nearest neighbors, they may deepen their relationships not only with one another but also with God.

QUESTIONS FOR CONSIDERATION

1) What pastoral response and guidance should the church offer to persons who are cohabitating, or are considering cohabitation?

2) How can the church support families who are raising children?

3) What employment practices (*e.g.* health care, paid family leave, child care, living wage) should the church adopt to support its employees and their families? What public policies should the church advocate to support families?

4) When an unmarried woman becomes pregnant unintentionally, what factors should be weighed in making a moral choice about adoption, abortion, or raising the child as a single parent? What pastoral response and guidance can the church offer to the pregnant woman as she considers this choice, and to the man who has fathered the child?

5) For a woman or man considering becoming a single parent through pregnancy, adoption, or foster parenting, what guidance can the church offer? Under what circumstances is intentional single-parenting a just, moral choice?

6) The Church teaches that Christian Marriage has the qualities of fidelity, monogamy, and lifelong commitment.
   a) Why is emotional and sexual faithfulness essential for a Christian Marriage?
   b) Why is the covenantal relationship between two parties (and two parties only—commonly called monogamy) essential for a Christian Marriage?
   c) Why is lifelong commitment essential for a Christian Marriage?

7) For people considering intimate relationships that do not have all three qualities of fidelity, monogamy, and lifelong commitment, or for people already in such relationships, what pastoral response and guidance should the church offer?

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[18] 1 Corinthians 13.

Singleness

Any commentary on single people is inherently challenging because of the diversity present within singleness.[1] Single people may choose to be single and understand this choice as a call from God. Others are unattached involuntarily, either via the death of a spouse, a divorce not of their choosing, physical or mental illness that complicates being in relationship, not having found a partner, or any number of reasons. A single person's primary relationships may be with their family, their friends, an intentional or monastic community, their children and grandchildren, or any combination thereof. Single people may live alone, with roommates, or with family. Adults of all ages can be single. Although society and the church often assume singleness to be a temporary state, a kind of "pre-married" phase, it may last for decades or the entirety of a person's life. Many of the older adults in our congregations will be single for the rest of their lives after the loss of a spouse. Singleness should not then be viewed as a waiting period or as a state less desirable than marriage; it is not "tragic, embarrassing and freakish," as one single priest describes the common stereotype of single people.[2] Singleness is hardly unusual in our time, for that matter. The United States Census Bureau reported in 2015 that 49.7 percent of people age 15 and older were either never married, widowed, divorced, or separated.[3] For some Christians, singleness can be a vocation to which God calls a person for a season or for life. For others, it is a source of grief and pain, a state they would never have chosen for themselves. And for some, singleness brings both advantages and disadvantages, just as marriage does for some couples. One single person explains:

> I am single and celibate. Having been this way for most of my life I can't say whether this is more positive or more negative than any other status. It has been simpler, I suspect, in some ways, I only have my own opinion to consider when discerning a move or a change. On the other hand, it can be lonely; and has been more difficult since my parents and brother have all died––I always appreciated a friendly voice on the phone (or in person) of someone who has known me all my life.[4]

Theological reflection on singleness has attempted to lift up the positive qualities of singleness, in contrast to common stereotypes of single people as desperate, lonely, and miserable. Such theological reflection tends to consider singleness from the individualistic viewpoint of white American culture. For example, singleness, to Marie Theresa Coombs and Francis Kelly Nemeck, is a middle course between marriage and celibacy (a vowed state of abstaining from all sexual and

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[1] A good, though dated, illustration of this diversity is the narratives in Kay Collier-Slone, *Single in the Church: New Ways to Minister with 52% of God's People* (Washington, DC: Alban Institute, 1992), 2-7.

[2] Stephanie Couvela, *Celebrating Celibacy: Sexuality, Intimacy and Wholeness for the Single Adult* (Cambridge: Grove Books, 2007), author's biography.

[3] This age category is defined by the Census Bureau. This figure includes unmarried adults who cohabit with a romantic partner, who are not considered single for the purposes of this essay. United States Census Bureau, "America's Families and Living Arrangements: 2015: Adults," http://www.census.gov/hhes/families/data/cps2015A.html (accessed September 3, 2016).

[4] This story is taken from narratives obtained through a survey on relationships circulated throughout The Episcopal Church in fall, winter, and spring of 2016-17 by the Task Force on the Study of Marriage. We were moved by these glimpses of relationship, and they have allowed writers of this series of essays to add a personal context. Through stories we are led to deeper truths about relationship and a profound appreciation of each writer's dignity. We understand that each story is a glimpse of one person's experience and realize that there are many stories to tell.

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romantic relationships); a person who has chosen to be single for the sake of Christ and the Gospel possesses an independence that gives them the freedom for complete dependence on God.[5] Stephanie Couvela asserts that the freedom of celibacy is, at its best, "freedom *for* a full and creative life."[6] Wesley Hill finds that friendship is the appropriate form of love for him as a gay Christian committed to celibacy, and indeed, many single people possess the spiritual gift of being a remarkable friend.[7] Single people bring many other gifts to the church: self-sufficiency, the creativity born of independence, and often the time and emotional energy to commit to their faith communities that can be in short supply for couples, especially those with young children. The apostle Paul recognized that the devotion of single people to the affairs of the Lord held the Corinthian church together (1 Cor 7:32-35). The Episcopal Church would benefit from perspectives on singleness drawn from cultures that emphasize community or family over the individual.

Singleness does not have to mean aloneness. These authors all stress the universal human need for intimacy and particularly for physical touch, which single people may find it difficult to fulfill.[8] Everyone requires meaningful human interactions to counteract loneliness and isolation. Many single people receive these interactions through their families, especially in cultures that prize close extended family systems. Some single people are in romantic relationships, yet live by themselves. For other single persons, faith communities can be important in meeting this fundamental need. The sacramentality of human touch found in the exchange of the Peace, the hand of blessing laid on the shoulder, and the hug at coffee hour may be of particular emotional significance for a single person. This may be the only physical touch they receive over the course of the week.

Singleness inevitably raises questions of sexual ethics, and the Task Force's essay "Sexual Intimacy: A Complex Gift" addresses this in more depth. Here, it should be acknowledged that single people have a variety of experiences of sexuality, both with a partner and with themselves, and some single people find grace in sexual intimacy. Pastors, theologians, and ethicists might ask, "What does a healthy theology and ethic of sexuality look like for a single person? How does sexuality fit into holiness of life for a single Christian?" The Task Force essay "Theological Foundations for Christian Relationships" provides a starting point for this kind of reflection.

Though nearly half the population is unmarried, churches often appear unmindful of single people. Any survey of profiles prepared by congregations searching for clergy reveals that parishes' most sought-after demographic is families with young children. This seems to be the consequence of our denominational anxiety about the shrinking and aging of The Episcopal Church: if our Sunday schools and youth groups are full, it must mean that the church isn't failing and it has a future. Yet the often-relentless focus on families with young children sends a message to anyone who does not fit that mold. In a culture in which "family" often means "married couple with children," website banners that declare "We love families! All families welcome!" can inadvertently communicate to single people, as well as couples without children or with grown children, that they are unwanted in the

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[5] Marie Theresa Coombs and Francis Kelly Nemeck, *Discerning Vocations to Marriage, Celibacy and Singlehood* (Collegeville, MN: Liturgical Press, 1994), 186-190.

[6] Couvela, 17.

[7] Wesley Hill, *Spiritual Friendship: Finding Love in the Church as a Gay Christian* (Grand Rapids: Brazos, 2015).

[8] Coombs and Nemeck, 198; Couvela, 12.

church. Significant resources devoted to family ministry while nothing is offered for adults without children tell a similar story. Congregations, dioceses, and The Episcopal Church must be vigilant that our tag line––The Episcopal Church Welcomes You––does not become a lie for half the population. The vision of church communities that Couvela holds, "where marriages are strengthened and enriched by friends from outside, where single people can find closeness and touch, where children can have friendships with adults as they grow in faith," is possible only if we acknowledge and celebrate the single people in our midst.[9]

QUESTIONS FOR CONSIDERATION

1) In a culture centered around the nuclear family, how does the church acknowledge the dignity of singleness?

2) How does the church teach young people about intimate relationships? What does the church teach young people about intimate relationships?

3) In what ways is it possible for sexual intimacy to be a means of grace for a single person?

4) What practices of discernment can the church provide to people considering the vocations of singleness, marriage, or celibacy? How do we listen for God's call to us regarding intimate relationships?

[9] Couvela, 25.

Sexual Intimacy - A Complex Gift

During the course of our work, members of the Task Force for the Study of Marriage began to see the subject of sexual intimacy required further study and reflection. While this topic may be broached within the context of preparation for Holy Matrimony, current trends suggest the need to expand the church's teaching and thinking beyond marriage preparation.

Census data reported 6 million households maintained by unmarried couples in 2006.[1] By 2016 the same type of households had increased to 7.2 million.[2] Coupled with the growing numbers of single adults[3] in the United States, the need to provide discussion and potentially guidelines for sexual intimacy seems warranted.

The Task Force is not of one mind about how the church might engage the subject of sexual intimacy. Nor do we have adequate data to confirm the trends cited above in dioceses beyond the United States of America. Still, we see a growing need to teach, counsel, and prepare single individuals, unmarried couples, and married couples to contemplate sexual intimacy as religious people.

When the church considers Holy Scripture for marriage preparation, the church could do the same in teaching and counseling about sexual intimacy for adults. For example, the description of "naked and were not ashamed" could be as important as citing the "one flesh" of the man and his wife in the second chapter of Genesis (*Genesis 2:25*). Further, a wealth of poetic descriptions of erotic love is found in the Song of Songs. Even if the poems of two lovers found in this book are read as symbolism or metaphor, the poetry remains a sensitive and sensual description of sexual intimacy. Passages such as these may give us insight about God's vision for sexual intimacy.

If we were to consider sexual intimacy a blessing, given by God for the good of God's people, then this blessing is a complex gift. A gift able to bestow joy, deepen love, give pleasure, and kindle the holy in relationship. Like so many of God's gifts, this gift can be more than we could think to ask or imagine on our own. Yet unlike other gifts, this one requires maturity, consent, vulnerability, and respect for one's self, and respect for another person. For some, this blessing or gift may require compassionate and skilled teaching from the church.

The church seems to have an understandable desire to speak a single truth for all, or even for a majority, as sexuality is discussed, taught, and addressed in church governance. Still, circumstances require nuanced teaching and theology in response to the variety of situations presented by consenting adults. Sexual expression includes a wide range of behaviors from a casual one-time

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[1] United States Census Bureau, "American Community Survey: 2006: Unmarried Partnered Households by Sex of Partner," https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk (accessed November 5, 2017).

[2] United States Census Bureau, "American Community Survey: 2016: Unmarried Partnered Households by Sex of Partner," https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk (accessed November 5, 2017).

[3] United States Census Bureau, "Facts For Figures: Unmarried and Single Americans Week: Sept. 18-24, 2016," https://www.census.gov/newsroom/facts-for-features/2016/cb16-ff18.html, (accessed November 5, 2017).

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encounter to a life-long committed relationship where sexual intimacy is one of many types of intimacy.

For some Christians, sexual intimacy is only to be expressed within monogamous heterosexual marriage.[4] From this perspective the gift of sexual intimacy is one of the blessings of marriage. The bodily expression is underscored in the first English Book of Common Prayer (1549). Thomas Cranmer, himself a married man, included among the purposes of marriage, "mutual society, help, and comfort…both in prosperity and adversity." At the giving of the ring the husband said to his wife, "With my body, I thee worship."

For others, sexual intimacy outside of marriage can be an experience of grace.[5] An unmarried woman in a long-time relationship wrote of a robust love life with her partner. "We functioned as a true pair in many ways…that was an aspect of life lacking for me basically all my years…There are people who merely want companionship — a domestic or activity partner. I, however, believe that most of us yearn to be chosen by one other person, and to transcend convenience and/or convention by knowing and being known intimately and uniquely. Such relationships give each partner wings."[6]

Whether sexual relationships are between married or unmarried people, sexual intimacy can be a blessing drawing a couple into deeper bonds of trust, love, vulnerability, and holiness.[7] Such intimacy can also be a source of sorrow, a tool for manipulation, and a method of exploitation. By saying nothing to those in sexually intimate relationships who are not married, the church endorses this grace as only meant for and experienced by married people. It may also assume that all married people have healthy consensual sexual relationships. The church could promote a healthy and holy approach to sexual intimacy with teaching, guidance, and pastoral care for this complex gift.

Resolution D039 - 2000, sets an expectation that life-long committed relationships are to "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." Further, the resolution denounces "promiscuity, exploitation, and abusiveness in the relationships of any of our members." In it the church pledges "to hold all its members accountable

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[4] "My understanding of sexual ethics has been that, regardless of whether it's gay or straight, sex outside marriage is wrong." Archbishop of Canterbury Justin Welby, interview with Dominic Lawson, "So Many Crosses to Bear," thetimes.co.uk, March 17, 2013.

[5] "An absolute declaration that every sexual partnership must conform to the pattern of commitment or else have the nature of sin and nothing else is unreal and silly." Former Archbishop of Canterbury Rowan Williams, "The Body's Grace," 10th Michael Harding Memorial Address, Institute for the Study of Christianity and Sexuality, , 1989, reprinted in *Theology and Sexuality: Classic and Contemporary Readings*, edited by Eugene F. Rogers, Jr. (Oxford: Blackwell, 2002), 315-16.

[6] This story is taken from narratives obtained through a survey on relationships circulated throughout The Episcopal Church in fall, winter, and spring of 2016-17 by the Task Force on the Study of Marriage. We were moved by these glimpses of relationship, and they have allowed writers of this series of essays to add a personal context. Through stories we are led to deeper truths about relationship and a profound appreciation of each writer's dignity. We understand that each story is a glimpse of one person's experience and realize that there are many stories to tell.

[7] Williams, "The Body's Grace."

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to these values, and will provide for them the prayerful support, encouragement, and pastoral care necessary to live faithfully by them."

For those seeking guidance for the expression of sexual intimacy, the values held in this resolution have the potential to inform, support, and guide decision making. This resolution also can provide direction to the church as it seeks to develop pastoral and formational resources regarding sexual intimacy.

QUESTIONS FOR CONSIDERATION

1) In what ways does Holy Scripture inform your experience of sexual intimacy?

2) How have you experienced sexual intimacy as a God's blessing or gift to you? to your relationship?

3) What does the existence of sexual pleasure teach us about being made in the image of God?

4) What should the Church teach about sexual intimacy for married and unmarried people?

5) How should the church teach young people about the gift of sexual intimacy and the right use of this gift?

6) What support from the Church is needed by older adults in sexually intimate relationships?

Responses to the Essays

In the summer of 2017, an early draft of these essays was shared with the faculty of all ten Episcopal seminaries and an additional group of theologians, ethicists, pastors, liturgists, social scientists, and educators[1] from a broad range of backgrounds for feedback. Twenty individuals or organizations offered responses:

1) Thomas Breidenthal, Bishop of Southern Ohio

2) Isaiah Brokenleg, MDiv student (Diocese of Fond du lac), Church Divinity School of the Pacific

3) Matthew Burdette, Episcopal Church of the Good Shepherd, Dallas

4) Chad Gandiya, Bishop of Harare, Zimbabwe (whose archdeacon responded to each of the questions)

5) Mary Gray-Reeves. Bishop of El Camino Real

6) Scott Gunn, Executive Director of Forward Movement

7) Tobias Haller, 2012-2015 task force member

8) Wesley Hill, Assistant Professor of Biblical Studies, Trinity School for Ministry

9) Anne Hodges-Copple, Bishop Suffragan, Diocese of North Carolina

10) Deon Johnson, St. Paul's Episcopal Church, Brighton, MI

11) Lam Chun Wai, Vice Principal and Lecturer in Liturgical Studies, Ming Hua Theological College, Hong Kong

12) Robert MacSwain, Associate Professor of Theology, School of Theology, University of the South

13) Dale B. Martin, Woolsey Professor Emeritus of Religious Studies, Yale University

14) Kevin Moroney, Associate Professor of Liturgics, General Theological Seminary

15) Jane Patterson, Associate Professor of New Testament, & Director of Community Care, Seminary of the Southwest

16) Jenny Te Paa Daniel, Anglican Church in Aotearoa, New Zealand, and Polynesia

17) Adrian Thatcher, Honorary Professor in the Department of Theology and Religion at the University of Exeter, UK; Honorary Fellow in Medical Humanities in the Plymouth University Peninsula Schools of Medicine and Dentistry, UK

18) Kwasi Thornell, Lecturer in Pastoral Theology, Church Divinity School of the Pacific

19) Gerald West, Professor of Biblical Studies, University of Kwazulu-Natal, South Africa

20) The faculty of the Church Divinity School of the Pacific

Responses fell into three general categories:
A. Appreciations of the work;

[1] 2015-A037 Continue the work of the Task Force; Resolve 5.

B. Critiques and suggestions that were incorporated into the final essays;

C. Critiques and suggestions not incorporated into the essays, which are summarized and paraphrased in the six sections below.

1. <u>Personal narratives appear elevated.</u>

Many responders commented on the personal narratives interspersed throughout the essays. Some supported their use. Others wondered:

- Are the personal narratives too supportive of the points in the essays?

- Do the personal narratives paint too rosy a picture of some kinds of relationship, not adequately expressing the challenges some may face?

- Are the personal essays given too central a position in the essays?

- Are the personal narratives truly representational?

- Is there enough balance in the narratives, as between pro and con, male and female, young and old, success and failure in relationship, heterosexual and same-sex, married and unmarried, various cultures, various regions of the church, et cetera?

2. <u>The church should stand for something.</u>

Some responders expressed concern about the approach of the essays, wishing they had taken on a mantle of moral teaching:

- These essays do not speak in a clear moral voice.

- In a regressive world, the church needs to stand for something.

- The very concept of "contemporary trends and norms" is troubling.

- Human society's whims are irrelevant to the calling of the church.

- We should question the validity of contemporary norms.

- We should question where contemporary norms are originating.

- Human life and human sexuality have a specific purpose: we are made for a reason; we are given the gift of sexual expression for a reason.

- Why does a person's sense of "experiencing a blessing" through a certain life-choice, life-style, or activity matter?

- God creates goods for a specific purpose.

- When we misuse these goods harm is done.

- These goods and their purpose have been fully revealed to the Church.

- Our job is not discernment but duty.

3. <u>Culture: strengths and challenges</u>

In these essays, an entire piece is dedicated to culture. Some responders were grateful for essay's approach, while others expressed concerns:

- Culture is the problem. Culture is relative, while God is the same yesterday, today, and forever.

- The Church will lose its moorings if we begin comparing cultures and bowing to cultural dictates.

- The Church should speak in a clear voice across all cultures.
- In the generation of these essays were enough voices across cultures heard? If not, that undermines the work that has been done.
- The Church is not separate from culture; the Church is and has always been a part of culture.
- Culture is of primary importance if you want to appreciate the richness and diversity of the Body of Christ.
- Aspects of culture can profoundly affect relationships—power dynamics, unique social pressures, effects of continued racism, stressors related to one's living environment, historical injustices, and more. These elements could have been included in the essays.

4. When is sexual intimacy appropriate?

These essays consider foundations for relationship and sexual intimacy. Responders had a number of thoughts in these areas:

- The Church should teach that sexual intimacy is only ever appropriate between married persons.
- The Church should teach that sexual expression between same-sex persons is never acceptable; people with such attraction should concentrate on having lots of good friendships.
- The Church should teach that sexual intimacy is acceptable between persons when their relationship is on a trajectory toward marriage.
- Sexuality is not a particular "gift," but part of the broad giftedness of being human.
- Is "consent" the only firm moral norm underlying the essays?
- What must be present in a relationship for the Church to be able to call sexual expression in that relationship good?
- Do the promises, character, or intent of a relationship determine when sexual expression is appropriate?

5. Regarding pregnancy

These essays do not consider the potential of pregnancy and childbirth, several responders noted:

- Discussions of sexual intimacy should always keep in mind the serious implication of pregnancy.
- Becoming a single parent by choice is an immoral and unjust decision with serious negative implications for the child.
- Marriage is better for the raising of children than cohabitation or separated households. The Church should stand for this.

6. Marriage and sanctification

Several responders expressed a desire to probe Christian Marriage more deeply to understand what makes it special:

- What makes marriage so special among human relationships?
- What makes marriage sacred?
- What makes marriage sanctifying?
- Grace might be found in other kinds of relationships, but it is a sure bet in Christian marriage.
- If we could understand the spiritual process underlying marriage we could open doors in our attempt to understand how God is at work in other forms of relationship.

For Further Reading: Marriage, Family, and Sexuality

Adichie, Chimamanda Ngozi. "The Danger of a Single Story." TED talk, July 2009, https://www.ted.com/talks/chimamanda_adichie_the_danger_of_a_single_story. "The single story creates stereotypes, and the problem with stereotypes is not that they are untrue, but that they are incomplete. They make one story become the only story." Adichie calls us to seek out alternative stories—particularly important when we consider marriage and family patterns across different races, ethnicities, and cultures.

Bradbury, John, and Susannah Cornwall, eds. *Thinking again about Marriage: Key Theological Questions*. London: SCM Press, 2016. The essays in this book explore biblical, historical, theological, and liturgical perspectives on marriage, gender, and sexuality. The authors represent a broad ecumenical spectrum of theologians, pastors, and a social worker.

Breidenthal, Thomas E. *Christian Households: Sanctification of Nearness*. Cambridge, MA: Cowley Publications, 1997. Breidenthal draws upon scripture and, to a lesser extent, Christian tradition to develop a theology of the Christian household, and he proposes criteria to determine which forms of household are holy.

Breidenthal, Thomas E. *Sacred Unions: A New Guide to Lifelong Commitment*. Cambridge, MA: Cowley Publications, 2006. Building on his earlier work on Christian households, Breidenthal considers romantic love as a form of love of neighbor. He explores precedents in Scripture and Christian tradition for a positive value of romantic love based on the command to love one's neighbor and discusses disciplines necessary to build a lifelong relationship.

Cahill, Lisa Sowle. *Sex, Gender, and Christian Ethics*. New York: Cambridge University Press, 1996. Cahill seeks to draw together scripture, ethics, and contemporary approaches, like feminism and postmodernism, and apply them to sexual ethics.

Choplin, Leslie, and Jenny Beaumont. *These Are Our Bodies: Talking Faith and Sexuality at Church and Home*. New York: Church Publishing, 2016. This resource offers a guide to conversation about sexuality from theological, ethical biological, and practical perspectives. In addition to a foundation book for educators, clergy, parents, youth leaders, and others, the program includes leader's guides, participant books, and parent guides designed for use with different age levels.

Coakley, *The New Asceticism: Sexuality, Gender, and the Quest for God*. New York: Bloomsbury Continuum, 2015. Coakley suggests that we need to re-examine our theology of desire, understanding *eros* in a broad sense, which goes beyond simple sexual attraction to a desire for the good in society, the good for the poor, and a desire for God. This theological grounding, she suggests, will help get us out of a binary conflict on sexual issues.

Coates, Ta-Nehisi. *Between the World and Me*. Spiegel & Grau, 2015. This book-length letter from a father to his son illustrates the stress that racism puts on black Americans' marriages and families while challenging common stereotypes of African-Americans.

Coontz, Stephanie. *Marriage, a History: From Obedience to Intimacy or How Love Conquered Marriage*. New York: Viking, 2005. This history of marriage speaks to marriage in the ancient world, in early Christianity, and up to the present time, including especially the "Love Revolution" which brought a new paradigm to the purpose of marriage (and new questions).

DeGenova, Mary Kay, ed. *Families in Cultural Context: Strengths and Challenges in Diversity.* McGraw Hill, 1997. This textbook, with chapters written by different authors, offers a comparative view of families from different ethnic groups. Chapters explore changes and adaptations made by families following their immigration into the US.

Demo, David, Katherine Allen, and Mark Fine, eds. *The Handbook of Family Diversity.* Oxford: Oxford University Press, 1999. This textbook discusses different aspects of family, including race, socioeconomic status, family structure, sexual orientation, and gender. Each chapter introduces recent research and theoretical developments; the book does not consider religion.

Edin, Kathryn, and Maria Kefalas. *Promises I Can Keep: Why Poor Women Put Motherhood Before Marriage.* Berkeley: University of California Press, 2005. This sociological study of three high-poverty neighborhoods—one largely white, one Hispanic, one African-American—in Philadelphia with high rates of unmarried mothers argues that poor women value marriage so highly that they are reluctant to enter into it, having realistically assessed that the men in their lives are not strong prospects for a lifelong commitment.

Farley, Margaret. *Just Love: A Framework for Christian Sexual Ethics.* New York: Continuum, 2006.

Haller, Tobias. *What About Sex? A Little Book of Guidance.* Church Publishing 2015. This book draws upon Scripture as well as science and psychology to discuss how we use our bodies sexually.

Hill, Wesley. *Spiritual Friendship: Finding Love in the Church as a Celibate Gay Christian.* Grand Rapids: Brazos, 2015. Part memoir, part biblical and theological reflection. Hill diagnoses our modern condition as one of loneliness, in which traditional communal and familial bonds have in large part broken down, leaving the sexual bond and the nuclear family to carry much more weight than they should have to bear. Hill calls on the church to be a genuine family, a community in which the sexual and marital bonds can take their place among other committed and communal forms of love.

Hymowitz, Kay, Jason S. Carroll, W. Bradford Wilcox, and Kelleen Kaye. *Knot Yet: The Benefits and Costs of Delayed Marriage in America.* University of Virginia: The National Marriage Project, 2013. http://nationalmarriageproject.org/wp-content/uploads/2013/03/KnotYet-FinalForWeb.pdf. This study considers why American twenty-somethings are delaying the age of marriage and the benefits and costs of this delay. In concludes that America must bring childbearing and marriage back into sync.

Jeal, Roy R., ed. Human Sexuality and the Nuptial Mystery. Eugene, OR: Cascade Books, 2010. This collection of essays, originally presented at the St. Margaret's Consultation on Doctrine, Liturgy, and Preaching held at St. Margaret's Anglican Church in Winnipeg, Canada in 2008, considers human sexuality and marriage from a theological standpoint.

Lerman, Robert I., and W. Bradford Wilcox. *For Richer, For Poorer: How Family Structures Economic Success in America.* Institute for Family Studies, American Enterprise Institute, 2014. http://www.aei.org/wp-content/uploads/2014/10/IFS-ForRicherForPoorer-Final_Web.pdf. American Enterprise Institute policy paper advocating for marriage, as better for children, partners, and the family.

Long, Kimberly Bracken. *From This Day Forward: Rethinking the Christian Wedding.* Louisville: Westminster John Knox Press, 2016. Addressing the question of whether the church should be in

the "wedding business," Long argues for marriage as part of the church's mission. Includes historical overview of marriage.

McCarthy, David Matzko. *Sex and Love in the Home*. New edition. London: SCM Press, 2004. From his Roman Catholic perspective, the McCarthy critiques a "closed suburban home" and argues instead for "an open, socially reproductive household" interdependent with its neighbors, standing in contrast to the market economy.

McCleneghan, Bromleigh. *Good Christian Sex: Why Chastity Isn't the Only Option—And Other Things the Bible Says about Sex*. New York: HarperOne, 2016. McCleneghan, a pastor serving a congregation in the United Church of Christ, brings Scripture into conversation with the work of theologians, ethicists, and psychologists, to offer a positive view of human sexuality and explore how Christians can practice their sexuality in light of their faith.

McGoldrick, Monica, Elizabeth A. Carter, and Nydia Garcia-Perez. *The Expanding Family Life Cycle: Individual, Family, and Social Perspectives*. This textbook for family therapists offers perspectives on human development and developmental tasks, taking account of societal changes influencing life-cycle patterns; it does not offer a theological perspective.

Prichard, Robert W. *Cohabiting Couples and Cold Feet: A Practical Marriage-Preparation Guide for Clergy*. New York: Church Publishing, 2008. The first part of this book delves deeply into statistics about relationships, marriage, cohabitation, etc. in the United States. The second part looks at the process of encountering, pastoring, counseling and performing services for people seeking marriage in the Episcopal Church.

Rogers, Eugene F., Jr., ed. *Theology and Sexuality: Classic and Contemporary Readings*. Malden, MA: Blackwell Publishing, 2002. This is a collection of readings from both classical and contemporary sources, encompassing Roman Catholic, Eastern Orthodox, and Protestant sources. Rogers provides a brief introduction for each. The focus is the question of what marriage is for, beyond procreation of children and legitimation of sexual intercourse. The resources he includes present marriages as signs to the community of the faithful of God's reconciliation, and sexuality as a means of sanctification that draws us into God's life.

Sawhill, Isabel V. *Generation Unbound: Drifting into Sex and Parenthood without Marriage*. Washington, DC: Brookings Institution Press, 2014. Sawhill explores changing patterns of marriage and family, focusing on increase in single parenting, but does not offer a theological perspective. She attempts to offer an even-handed assessment, considering perspectives of both "traditionalists" and "village builders," and argues for two-parent families.

Thatcher, Adrian. *Marriage after Modernity: Christian Marriage in Postmodern Times*. Washington Square, NY: New York University Press, 1999. Thatcher offers a vision for Christian marriage that is based in Scripture and history and responds to contemporary social and cultural changes.

Thatcher, Adrian, ed. *The Oxford Handbook of Theology, Sexuality, and Gender*. Oxford: Oxford University Press, 2015. This comprehensive collection of essays explores gender and sexuality in scripture and Christian tradition, as well as providing perspectives from other faiths and offering insights from biology and social sciences.

Thatcher, Adrian. *Theology and Families*. Malden, MA: Blackwell Publishing, 2007. Thatcher considers how Christian faith and theology can contribute to the thriving of families and children.

Witte, John, Jr. *From Sacrament to Contract: Marriage, Religion, and Law in the Western Tradition.* Second edition. Louisville, KY: Westminster John Knox Press, 2012. Study of the interplay of law, theology, and marriage from classical times through the Reformation. Traces "the millennium-long reduction of marriage from a complex spiritual, social, contractual, and natural institution into a simple, private contract with freedom of entrance, exercise, and exit for husband and wife alike." Extended discussion of the theology of marriage in patristic, medieval Catholic, Lutheran, Calvinist, Anglican, and Enlightenment traditions.

Witte, John, Jr. *The Sins of the Fathers: The Law and Theology of Illegitimacy Reconsidered.* New York: Cambridge University Press, 2009. Witte applies his legal and historical acumen to the development of a "doctrine of illegitimacy," for which he finds no biblical justification. He argues that early Christian and rabbinical teaching did not stigmatize illegitimacy, and that a doctrine of illegitimacy developed in medieval Roman canon law. Witte calls for more attention to adoption as well as stronger laws to require birth parents, absent adoption, to support children born out of wedlock.

Clergy, Church and State: A Continuing Debate

The first Task Force on the Study of Marriage presented an essay titled, "Agent of the State: A Question for Discernment" in its report to the 78th General Convention.[1] This essay presented a series of topics for consideration in discussing the dual role of clergy in marriage, acting on behalf of both the church as an officiant in the sacramental rite of marriage and on behalf of the state as an authorized officiant to certify and register a marriage.

Predating the debate about legalizing marriage of same-sex couples, clergy would occasionally assert their discomfort in acting on behalf of the state in signing marriage licenses and at times would declare the church should not be in "the marriage business." Some of this discussion reflected views in support of the separation of church and state and a desire to disentangle the sacramental from the secular view of marriage. During the preceding triennium, there was some discussion, chiefly among clergy, centered around responses to the increasing number of court decisions extending marriage to same-sex couples. Some clergy were voicing their support for marriage for same-sex couples by pledging not to officiate at any marriages until all could be married. Others were responding to perceived pressure to change their deeply held views that marriage of same-sex couples is wrong, whether theologically or legally based. The latter group expressed their view in The Marriage Pledge: refusing to sign government issued marriage licenses and agreeing only to bless a civil marriage in opposition to the definition of marriage from "one man, one woman" to two people of same or opposite sex.

Anne Hodges-Copple described her discernment of her role in officiating marriages, considering these questions:

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[1] Appendix 1: Essays on Marriage, in Report of the Task Force on the Study of Marriage to the 78th General Convention (Reports to General Convention, 1976-2015, Archives of the Episcopal Church), pp. 85-87, https://www.episcopalarchives.org/e-archives/gc_reports/reports/2015/bb_2015-R044.pdf (accessed 8/19/17).

- As a priest, if I sign a marriage license, issued by the county clerk, am I acting as an agent of the State?
- If I refuse to sign such a license have I afforded some greater measure of justice to all couples who seek God's nuptial blessing?
- If I sign a marriage license have I privileged some married couples over others?
- If I decline to sign a marriage license will I give couples a great "teachable moment" about the importance of separation between Church and State?
- Do I need to protect the Sacrament of Marriage from the tarnish of the State's interference?[2]

Hodges-Copple's discernment led her to continue to sign state licenses for couples whose marriages she officiates.

Missing in this list of questions is discernment in community, the traditional way The Episcopal Church seeks to understand how God may be leading us in new directions. Such discernment ought to include lay leadership as well as clergy. The laity, after all, are the ones who bear the burden when the clergy decline to officiate a marriage, a burden rarely acknowledged when the clergy stand on their personal principles.

History: Church, State and Marriage

Who has the power to declare a marriage valid: the Church or secular authorities?[3] There is no consistent answer across the scope of Western Christianity. In some times and places, civil authorities have held sole jurisdiction over marriage matters. In others, marriage was the province exclusively of the Church. In still others—as in the contemporary United States, where judges or clergy may solemnize a marriage—secular and religious authorities shared authority over marriage.

In the first several centuries of Christianity, marriage was strictly a civil matter, and clergy had a limited role, if at all, in the formation of marriage. Patristic writers did not demand that secular authorities should submit to the Church in marriage cases, but rather exhorted Christians to obey the secular laws.[4] No liturgies related to marriage survive before the late fourth or early fifth century, when clergy began blessing the couple or the marriage bed, but not solemnizing the marriage itself.[5] Even when the Church did claim jurisdiction over marriage formation, neither a public wedding liturgy nor a priest was required to contract a valid marriage. Twelfth-century canon law held that "a valid marriage might be contracted either by the free and voluntary exchange of present consent between parties of legal age who were free to marry each other, or by the free and voluntary exchange of future consent between two parties legally able to marry each other, if that consent was ratified by

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[2] Anne Hodges-Copple, "Signing Marriage Licenses? Yes," in Greg Jones, ed., *Writings on Marriage: The Journal of the Bishop's Task Force on Marriage, Convention Edition* (Raleigh: The Episcopal Diocese of North Carolina, 2009), p. 99.
[3] "Secular authorities" and "civil authorities" are used here in acknowledgment that "state" is an anachronistic term before at least the seventeenth century.
[4] Edward Schillebeeckx, *Marriage: Secular Reality and Saving Mystery*, vol. 2, trans. N. D. Smith (London: Scheed and Ward, 1965), pp. 54-55.
[5] Philip L. Reynolds, "Marrying and Its Documentation in Pre-Modern Europe: Consent, Celebration, and Property," in Philip L. Reynolds and John Witte, Jr., ed., *To Have and to Hold: Marrying and Its Documentation in Western Christendom, 400-1600* (Cambridge: Cambridge University Press, 2007), p. 19.

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subsequent sexual intercourse."[6] The canons also decreed that banns should be proclaimed and a marriage should be solemnized *in facie ecclesiae*; a couple could be disciplined for not following the rules, but the Church still recognized their marriage as valid.[7] In their insistence on vows made in the present tense ("I take you to be my wife..."), Peter Lombard and other scholastics may have been trying to teach the laity how to contract a marriage properly without a priest.[8]

Yet couples continued to marry with little involvement of the Church. Florentine couples in the Renaissance usually exchanged vows in the bride's home, then the bride and her goods, the groom, and their friends processed to his house, where a priest might bless the marriage bed. That was the extent of the Church's role in marriage formation.[9] A compromise between Christian and civil authorities evolved in nineteenth-century Spanish and Mexican Texas, where the state recognized only Roman Catholic marriage ceremonies officiated by a priest, but most Anglo settlements did not have a priest. Stephen F. Austin proposed, and civil authorities agreed, to the solution of marriage by bond: the couple signed a marriage contract obligating them to have a priest solemnize their vows as soon as possible, or else pay a substantial fine.[10] This separation between civil marriage and a church wedding is the norm in modern-day France, where a couple must marry in a civil ceremony for their marriage to be legally binding; most couples hold a religious service the following day.

The understanding of marriage as a sacrament evolved in the early twelfth century among scholastics in Paris.[11] Peter Lombard clarified the concept of sacramentality and applied it to marriage; Thomas Aquinas argued that the couple's exchange of consent conferred grace.[12] The 1563 Tridentine decree on marriage, *Tametsi*, held that marriage is one of the seven sacraments, confirming local synodical statements dating back to 1184.[13] As the medieval Western Church came to understand marriage as a sacrament, it also gained exclusive jurisdiction over marriage. Historians disagree on when this happened; dates range from the ninth century to the thirteenth.[14] Regardless of the date, R. H. Helmholz, the authority on this subject, cautions against thinking of the jurisdiction question as a contest between civil and ecclesiastical structures. He asserts, "It was not a question of competition between secular and ecclesiastical jurisdictions. The problem was to ensure that ordinary marriage disputes went to any court at all. The real hurdle was the persistent idea that people could regulate marriages for themselves."[15] Examples abound of medieval people who contracted marriages of

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[6] James A. Brundage, *Law, Sex, and Christian Society in Medieval Europe* (Chicago: University of Chicago Press, 1987), p. 334.

[7] R. H. Helmholz, *Marriage Litigation in Medieval England* (Cambridge: Cambridge University Press, 1974), p. 524.

[8] Reynolds, "Marrying and Its Documentation in Pre-Modern Europe," p. 27.

[9] Thomas Kuehn, "Contracting Marriage in Renaissance Florence," in Philip L. Reynolds and John Witte, Jr., *To have and to Hold: Marrying and Its Documentation in Western Christendom, 400-1600* (Cambridge: Cambridge University Press, 20017), pp. 394, 396-400.

[10] Hans W. Baade, "Form of Marriage in Spanish North America," *Cornell Law Review,* vol. 61, no. 1 (1975), p. 8.

[11] Reynolds, "Marrying and Its Documentation in Pre-Modern Europe," p. 9.

[12] Brundage, *Law, Sex, and Christian Society in Medieval Europe*, pp. 270, 433.

[13] John Witte, Jr., *From Sacrament to Contract: Marriage, Religion, and Law in the Western Tradition,* 2nd ed. (Louisville: Westminster John Knox Press, 2012), p. 106.

[14] Christopher N. L. Brooke, *The Medieval Idea of Marriage* (Oxford: Oxford University Press, 1989), pp. 127, 140; Brundage, *Law, Sex, and Christian Society in Medieval Europe*, pp. 223, 319.

[15] Helmholz, *Marriage Litigation in Medieval England*, p. 5.

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dubious legality outside the purview of any authority, secular or religious. Any children born in such unions were likely illegitimate. Once a question was raised about the legality of a marriage—which often happened after the couple were estranged—the parties could find themselves unable to marry anyone else. This put women in particular at economic risk. In these circumstances, Helmholz implies, the church's willingness to assume jurisdiction over marriage cases was a benefit to the civil authorities. The Church was the only universal sovereign in the medieval West, and few medieval monarchs could claim either the Church's universal reach or its administrative capacity.[16] It should not surprise us that medieval authorities determined that church courts were better suited to investigate and judge matrimonial cases.

This history suggests that it is inaccurate to frame the question of authority over marriage as church versus the secular authorities. For most of Western Christianity, this was not an adversarial relationship, but something closer to a partnership. Both church and civil authorities preferred public wedding ceremonies because both had an interest in knowing who was married to whom: the Church wished to identify fornication and adultery and reify the concept of marriage as a sacrament; secular authorities needed to determine the property rights established through marriage.[17] Both church and civil authorities also had an interest in protecting unwitting spouses and innocent children from bigamists. Who was supervising the formation of marriage mattered less than that some authority was doing so. In this context, clergy may be seen less as agents of the state and more as agents of the couple, ensuring that their marriage was valid in the eyes of any authority.

Agent of the State or Agent for the Couple?
Arriving at an understanding that the historic interplay between clergy and civil authority has been one of mutually-beneficial partnership and appreciating the intent and context of recent concerns about clergy feeling tainted or somehow compromised by their partnership with the State in marriage, the Task Force is open to consider the role of clergy in a new way.

In a memorandum offered by Christopher Hayes, Chancellor of the Diocese of California, the Task Force received the image of clergy as advocates for the marrying couple—agents *of the couple,* as Chancellor Hayes described it.

He likens the role of a wedding officiant to that of an Officer of the Court. As an attorney, identified as an agent of any court, he is empowered to act in the *name* of the court, but only *on behalf of* his client. The court authorizes his role, but any and all work done is in support of his client's best interests, not the court's.

Therefore, extending this analogy, the Task Force is convinced to offer the clergy of our Church the more appropriate assertion that they actually serve as agents, or advocates, of the marrying couple. Clergy vouch for the marriage partners to the civil authority that all necessities for a marriage contract have been completed. Recognition as agents of the couple is consistent with the traditional role of clergy in marriage: as officiants, the clergy do not marry the couple; the couple marries

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[16] Witte, *From Sacrament to Contract*, p. 97.
[17] Lawrence Stone, *The Road to Divorce: England 1530-1987* (Oxford: Oxford University Press, 1990), p. 54.

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themselves with the blessing of the Church and the State. The requirements for the State to recognize a marriage include consent of two persons to marry, freely, seriously and plainly expressed by each in the presence of the other and in the presence of a defined officiant, and with a declaration by the officiant that the persons are married. Likewise the Marriage Canon requires the couple to assert each is legally free to marry and consent to do so "freely, without fraud, coercion or mistake as to the identity of either, or mental reservation" (Canon I.18.3[a]). Signing the State-issued marriage license merely verifies to the State official that a marriage ceremony between the two named people occurred on a specific date at a specific time and place, just as entering the required information into the Parish register certifies to the Church that the marriage took place.

Clergy are not enforcers of contract law, but rather are advocates for the persons entering into both sacred and civil commitments. Indeed, as signatories of marriage licenses, clergy enjoy the confidence expressed by civil authorities (for centuries) in their ability to provide helpful discernment to the couple as well as secure the necessities of a marriage contract.

Anecdotally, most clergy's issues around officiating at marriages have more to do with unpleasant or compromising wedding experiences than they do with complicity in any state legality. Clergy experiences of being dismissed by wedding planners, exploited by exuberant parents, disrespected by unchurched guests, along with abuse of parish property and holy spaces, all contribute to reluctance on the part of some clergy to participate in a marriage ceremony.

Some of these experiences can be ameliorated:
- Establish and publish written guidelines and policies for weddings that honor the sacred space and the sacred occasion;
- Train one or two members of the congregation to act as wedding planners and require couples to make their arrangements through them;
- Engage the Vestry in setting building use guidelines, including weddings;
- Educate the congregation regularly on all marriage requirements and policies;
- Develop and commit to a robust pre-marital counseling plan.

This more expansive frame of reference invites the Church not to step away from these opportunities, but rather to engage them more deeply. To recommit to formation of each couple, as well as the community they come from, the cleric fulfills her or his basic calling to be a pastor and teacher. Therefore, the Task Force invites the Church not to distance or withdraw from its views on the importance of marriage, but rather renew its commitment to the words of the opening address of the marriage rite:

> Therefore marriage is not to be entered into unadvisedly or lightly, but reverently, deliberately, and in accordance with the purposes for which it was instituted by God. (*Book of Common Prayer, p. 423*)

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IV. Essays on Marriage

prepared by the

Task Force on the Study of Marriage 2012-2015

Contents

The full text of the Liturgical Resources 2 can be found at the below link.

Liturgical Resources 2 - Full Text

V. Dear Beloved:
A Toolkit for the Study of Marriage

prepared by the

Task Force on the Study of Marriage 2012-2015

Contents

The full text of the Liturgical Resources 2 can be found at the below link.

VI. Pastoral Resources for Preparing Couples for Marriage

adapted from

Liturgical Resources 1, revised and expanded edition (2015)*

Contents

* Prepared by the Standing Commission on Liturgy and Music, 2009-2012

Pre-Marital Preparation: Introduction

Below is a guideline for a five-session, pre-marital preparation that may be used along with the materials described above. These materials were originally prepared by the Standing Commission on Liturgy and Music during the 2009-2012 triennium as part of its work of developing theological and liturgical resources for blessing same-sex relationships. They have been revised for use with any couple

Pre-marital preparation sets as its goal the strengthening of a lifelong, monogamous partnership rooted in Christ. General Convention Resolution 2000-D039 addresses the hope—the Church's and the couple's—for such relationships:

> *Resolved,* That we expect such relationships will 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; and be it further
> *Resolved,* That we denounce promiscuity, exploitation, and abusiveness in the relationships of any of our members; and be it further
> *Resolved,* That this Church intends to hold all its members accountable to these values, and will provide for them the prayerful support, encouragement, and pastoral care necessary to live faithfully by them.

Ideally, sessions last 60 to 90 minutes each, and both partners should be present for all sessions (although the preparer may decide to meet with one of the individuals to address specific issues). Those with experience preparing couples may choose to adapt, combine, or reorder this outline.

Presenters

Presenters are people chosen by the couple to support and present them to the presider and the assembly during the marriage. Presenters may be friends, parents, family members, or drawn from the local congregation. This option gives a voice to important people in the life of the couple during the liturgy and enriches the experience for all present. Presenters can also serve an important role in supporting the couple before and after their marriage ceremony. The selection of a couple mature in their relationship can be particularly helpful to a couple starting life together. The couple, together with the clergy or lay preparer, should talk as soon as possible about selecting presenters, so that the prayerful work of the presenters can begin early on.

Two short handouts provided in this pastoral resource (one for the couple and one for presenters) detail the role of presenters and are intended for use at the conclusion of the initial preparation session. They are designed for use with "The Witnessing and Blessing of a Marriage." Congregations offering presenters for "The Celebration and Blessing of a Marriage" or "The Celebration and Blessing of a Marriage 2" can use these handouts by substituting the text of the presentation from the Additional Directions (BCP p. 437; above, p. xx).

Session One: Getting to Know You and an Overview

This session focuses on getting to know one another. It also starts to address the details of the rite, offering the couple and the clergyperson an opportunity to study the rites together, looking at their meaning and choices and affirming that the marriage blessing, grounded in God, is given through the Church. Some clergy, however, may prefer to do a very general overview of the rites in this session, then study them more intensely later in the process.

Addressing the practical issues of the marriage at the outset helps to build trust and allows the couple to open themselves to the substance of the next four sessions. By providing even a general overview of the rites, the preparer can address questions and alleviate anxieties about the actual day. The couple and clergyperson officiating will need to decide, either in this session or later in the preparation, which rite to use.

Session One includes a great deal of material, some of which may be moved to another session. Handouts for this session include:
- The liturgies "The Celebration and Blessing of a Marriage" (BCP, pp. 422-32); "The Witnessing and Blessing of a Marriage" (above, pp. xx-xx); "The Celebration and Blessing of a Marriage 2" (above, pp. xx-xx)
- 2. *Declaration of Intention* (found at the end of this outline)
- 3. *About Presenters—For the Couple* (found at the end of this outline)
- 4. *Information for Presenters* (found at the end of this outline)

Outline of Session One
- Pray together.
- Get to know one another (varies as to how well the preparer knows the couple).
- Explore the couples' religious backgrounds, their experiences with the church(es), and their reasons for being in this congregation.
- Reflect on the theological significance of the couple's relationship. The *Declaration of Intention* and the marriage liturgies may be useful in this discussion. (This reflection might be moved to a later session.)
- Review and ask the couple to sign the *Declaration of Intention*.
- Walk through the marriage rites, raising theological issues and naming liturgical choices:
  - Discuss the eucharist as normative in the service. However, including a celebration of the eucharist may not be appropriate if only one member of the couple is Christian.
  - Emphasize the difference between a civil service and the ecclesial blessing that is part of the marriage service.
  - Answer general questions regarding details of the service and the Church's practice.
  - Introduce the possibility of presenters.

At the end of the session, provide written handouts and suggest "homework" topics for the couple to think about for Sessions Two and Three:
- Families of origin and growing up in them

- What worked and didn't work so well in their families of origin (this topic may also influence work in Session Four)
- Family church/religious history as well as each individual's history—positive and negative—with the church/religion
- Marriages of family members, particularly parents
  - Parents' ways of dealing with conflict
  - Parents' styles of child-rearing
  - Family tolerance of children's sexual orientation or gender identity.

Session Two: Learning from the Past, Part 1

This session provides a time for one member of the couple to speak and for the other to listen. Session Two opens with prayer, then looks back to focus upon the relationship of one partner with his/her family of origin, including exploring the marriage(s) of his/her parents and siblings and, if possible, grandparents and close friends. This discussion includes what the individual would or would not replicate from the past in his/her own ongoing and future relationships, particularly the relationship that is to be blessed. In addition, the individual can look at levels of acceptance of his/her relationship by his/her family and at other issues from family of origin and childhood.

The guiding assumption underlying this analysis is that certain issues are replicated from generation to generation, and that, once the issues are identified, individuals can choose to continue those patterns or deliberately alter them. This session works most effectively if the conversation flows naturally, rather than following a rigid interview, and if it includes the following important areas:

- Family: number and birth order of siblings

- Money: its role and influence in the family

- Sex: attitudes in family of origin about monogamy, fidelity, and the role of sex in relationship

- Alcohol and drugs: their places within the family as children grew

- In-laws: relationship with in-laws and greater family

- Children:

  - agreement or disagreement between parents about child-rearing

  - the individual's feelings about being a child in his/her family

- Conflict: parents' methods of arguing and disagreeing.

As the conversation concludes, the preparer invites the individual to identify what he/she would or would not replicate in his/her own adult relationship with the life partner. Following that, the silent partner is given the floor to comment on what he/she has heard and learned, especially any surprises.

Session Three: Learning from the Past, Part 2

This session continues the look back by extending the chance for the other member of the couple to speak about his/her family of origin. Both members of the couple need the opportunity to explore the topics and to hear each other's stories so that each can learn and appreciate more deeply what the other brings to their relationship.

Session Three, which also begins with prayer, duplicates with the second person the process with the first from Session Two. If time permits at the end, the couple might discuss the impact of family history on their own relationship.

Session Four: Looking to the Future

This session, an opportunity to look at the relationship today and into the future, invites the couple to name areas in the relationship that appear strong and supportive while also opening a space to identify and address areas that may be problematic. Thoughts, questions, and new information from previous sessions may help determine where the couple is today and where their relationship and household may need attention in the future.

After opening with prayer, this session should include discussion of:

- The couple's relationship in general: in-depth exploration of where they have been and where they are now
- Role of sex and intimacy in the relationship (for example, potential changes of sexual behavior as a result of committing to a monogamous relationship)
- Role of alcohol and drugs in the relationship
- Money (for example, household finances and financial planning)
- Legal protections (for example, medical and financial durable powers-of-attorney, wills and living wills, insurance)
- Household roles (for example, who takes out the trash, who keeps the social calendar?)
- Communication:
  - How the couple talks things through
  - What happens when they disagree
- Concerns for the future
- Decision-making as a couple
- Dealing with families as individuals (one's own as well as one's partner's) and as a couple
- Support networks, now and in the future.

Session Four concludes with a discussion of the need for boundaries between generations so that the couples' life as a unit may be seen as distinct from older and younger generations.

Session Five: Liturgical Decisions and Wrap-up

Session Five, focused on the marriage service itself, is an opportunity to make choices for the liturgy, based on the discussion at the first session. The depth of this discussion will be determined by what was or was not addressed in Session One. In addition, as the final session, Session Five serves as a time to consider questions that may have arisen from previous sessions.

Outline of Session Five

- Pray together.

- Address questions and concerns regarding previous sessions and other issues that have arisen.

- Review theological reflections in light of previous sessions and what is to come. The preparer can help the couple connect the spiritual practices of their life as a couple and the "staging" of the service. For example, will they process into the service together or separately, or will they be already in the worship space as the liturgy begins? Will they sit together during the Ministry of the Word or across the aisle from one another?

- Discuss details of the service itself:

  o Scripture (which passages speak particularly to the couple's life together?) and whether non-biblical readings may be included

  o Will the liturgy take place at the congregation's principal weekly celebration? Is celebration of the eucharist to be omitted for pastoral cause?

  o Other liturgical choices, especially:

    ▪ Which collect will be used?

    ▪ For the Witnessing and Blessing of a Marriage, which of the two vows will be used?

    ▪ Will rings be exchanged, or, if rings have already been worn, are they to be blessed?

    ▪ What music, if any, will be included? (The couple should consult with the congregation's musician.)

- Discuss presenters and their roles in supporting the couple in the service and in their ongoing life.

In closing, the preparer can assure the couple that they have done hard and important work together, work that is a gift both to the preparer and to the couple. The preparer can express his/her eager anticipation of the couple's marriage and of meeting their close and extended families, seeing them with their friends, and celebrating their relationship in the sight of God.

Handouts

1. *Declaration of Intention*
2. *About Presenters—For the Couple*
3. *Information for Presenters*
4. *Model Congregational Guidelines*

The *Declaration of Intention* requires the replacement of *N.N.* and *N. N.* in the first sentence with the couple's names.

Handouts 2 and 3 are designed for use with the liturgy "The Witnessing and Blessing of a Marriage." These handouts may be modified if one of the other marriage liturgies is to be used.

Handouts 2 through 4 are samples that may be adapted for the use of a specific congregation. In these, *"N. Episcopal Church"* should be replaced with the congregation's name, and a similar change made for "Episcopal Diocese of *X*."

Handout 1
Declaration of Intention
(Canon I.18.4)

We understand the teaching of the church that God's purpose for our marriage is for our mutual joy, for the help and comfort we will give to each other in prosperity and adversity, and, when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God. We also understand that our marriage is to be unconditional, mutual, exclusive, faithful, and lifelong; and we engage to make the utmost effort to accept these gifts and fulfill these duties, with the help of God and the support of our community.

_____   _____

Signature   Signature

Date: _____

Sample Handout 2
About Presenters—For the Couple

At *N.* Episcopal Church, we consider "The Witnessing and Blessing of a Marriage" to be a celebration supported by the congregation, much as candidates for baptism are supported by all the members of the Church. Just as those who are baptized are initiated into the full life of the Church, those who receive the Church's blessing upon their marriage are embraced in a new way in the faith community.

The Marriage Liturgy

The presentation takes place immediately after the sermon, as follows:

The couple comes before the assembly. If there is to be a presentation, the presenters stand with the couple, and the Presider says to them

Presider	Who presents *N.* and *N.* as they seek the blessing of God and the Church on their love and life together?
Presenters	We do.
Presider	Will you love, respect, and pray for *N.* and *N.*, and do all in your power to stand with them in the life they will share?
Presenters	We will.

Choosing Presenters

There are a variety of possibilities for choosing presenters who will stand with you and present you at the liturgy. It can be helpful to choose at least one member of this faith community to walk with you through this process. If you are new to the congregation, the priest (or other person designated) can help you discern whom you might consider. The selection of a couple mature in their relationship can be particularly helpful if you are just beginning your life together. Often, couples will choose their own parents, children, or other supportive family members to be their presenters.

Presenters can pray for you during the period of preparation before your marriage, keep you connected to the congregation, and continue to support you in your ongoing covenanted life together.

Finally, in choosing, remember that these people will stand with you during the liturgy and present you at this rite. Also remember that, immediately after you are presented, the entire congregation will vow to support you as you, in turn, become a blessing and bear grace to the entire congregation.

Because presenters serve an important role before and after the marriage, you and your clergyperson should talk early about selecting presenters, so that your prayerful partnership may begin as soon as possible.

Sample Handout 3
Information for Presenters

At *N.* Episcopal Church, we consider "The Witnessing and Blessing of a Marriage" to be a celebration supported by the congregation, much as candidates for baptism are supported by all the members of the Church. Just as those who are baptized are initiated into the full life of the Church, those who receive the Church's blessing upon their marriage are embraced in a new way in the faith community.

At the marriage, you present the couple to the presider and to the assembly, as follows:

> *The couple comes before the assembly. If there is to be a presentation, the presenters stand with the couple, and the Presider says to them*

Presider	Who presents *N.* and *N.* as they seek the blessing of God and the Church on their love and life together?
Presenters	We do.
Presider	Will you love, respect, and pray for *N.* and *N.*, and do all in your power to stand with them in the life they will share?
Presenters	We will.

As a presenter, your role begins even before the marriage. We encourage you to pray for the couple both privately and in the Prayers of the People at Sunday services during their period of preparation. You can continue to support their ongoing life by acknowledging the anniversary of their marriage and offering your presence whenever their household experiences times of difficulty or celebrates occasions of joy. If you are a member of the congregation, you also have a role in keeping them connected to others in the congregation.

As a presenter, you promise to support the couple as they become a blessing and bear grace to their families and friends, the Church, and the world. In this role, then, you are a witness to the blessing given and received in the marriage liturgy and carried forth by the couple into the world.

Sample Handout 4
Model Congregational Guidelines

NOTE: Most congregations adopt some form of marriage policy expressing norms and guidelines for couples preparing for marriage. All congregations may engage in a helpful and fruitful exercise to develop guidelines that reflect the Christian community in which they worship; the guidelines that are developed should apply to all couples. Obviously, such a policy is optional at the discretion of the clergy in consultation with the vestry or bishop's committee. As always with liturgical matters, final decisions are the responsibility of the clergy. Following is a model of a guideline that applies for all couples preparing for marriage. It may be modified to meet specific situations and needs.

Information for Couples Seeking Marriage at *N.* Episcopal Church

A. Introduction
The Christian community at *N.* Episcopal Church understands that relationships are complex and that making a lifelong commitment to a relationship through a marriage is a significant, exciting, and wonder-filled event in people's lives. We also believe that a Christian community that agrees to bless such a relationship needs to be intentional about supporting the couple as they prepare for the marriage and as they live out their lives.

We understand that committed, lifelong relationships, whether for gender-and-sexual-minority couples or different-sex/gender couples, are to be outward and visible signs of an inward, spiritual, and God-given love. In this context, *N.* Episcopal Church seeks to support all couples in their commitment to one another and to help make the love of God more visible for the whole community.

B. Guidelines
The following guidelines have been adopted by the lay and ordained leaders of *N.* Episcopal Church:

1. As required by the Canons of The Episcopal Church at least one member of a gender-and-sexual-minority couple must be baptized.

2. It is desirable that at least one member of the couple be an active member of this, or some other, Christian community. We hope this membership might include giving serious, prayerful consideration to supporting the congregation through time, talent, and/or treasure.

3. Approximately six months' notice should be given to allow for planning and pastoral preparation.

4. If the couple has no connection with *N.* Episcopal Church but wishes to have their marriage at *N.* Episcopal Church or to use the services of *N.* Episcopal Church's priest:

- they should be able to show that at least one of the couple has active membership in another Episcopal or Christian congregation;

- they need to complete marriage preparation with their own or other clergyperson or a qualified lay preparer;

- they might consider making a financial contribution to *N.* Episcopal Church in thanksgiving for their marriage and for the ongoing support of the Church, its ministry and mission. A creative formula to calculate this contribution might be to consider a tithe (10 percent) of the budget for the entire celebration. *[Clergy have discretion here, as resources vary greatly from couple to couple. Also, if a couple is returning to Church for the first time, an unconditional welcome may be the best pastoral response.]*

In all cases, it is important that all concerned comply with the laws of the state, the Canons of the Episcopal Church, and the canons and policies of the Episcopal Diocese of *X* as well as the directives of the diocesan bishop, including compliance with diocesan policies for cases in which the relationship is not the first marriage for one or both people.

The full text of the Liturgical Resources 2 can be found at the below link.

[Liturgical Resources 2 - Full Text](#)

VII. Appendices

Contents

1. Marriage Canons

From The Episcopal Church, Constitution and Canons, 2015

TITLE I:
ORGANIZATION AND ADMINISTRATION

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 these canons concerning the solemnization of marriage. Members of the Clergy may solemnize a marriage using any of the liturgical forms authorized by this Church.

Sec. 2. The couple shall notify the Member of the Clergy of their intent to marry at least 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. Prior to the solemnization, the Member of the Clergy shall determine:

(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 nature, purpose, and meaning, as well as the rights, duties and responsibilities of marriage.

Sec. 4. Prior to the solemnization, the parties shall sign the following Declaration of Intention:

We understand the teaching of the church that God's purpose for our marriage is for our mutual joy, for the help and comfort we will give to each other in prosperity and adversity, and, when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God. We also understand that our marriage is to be unconditional, mutual, exclusive, faithful, and lifelong; and we engage to make the utmost effort to accept these gifts and fulfill these duties, with the help of God and the support of our community.

Sec. 5. 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. 6. A bishop or priest may pronounce a blessing upon a civil marriage using any of the liturgical forms authorized by this Church.

Sec. 7. It shall be within the discretion of any Member of the Clergy of this Church to decline to solemnize or bless any marriage.

CANON 19: Of Regulations Respecting Holy Matrimony:

Concerning Preservation of Marriage, Dissolution of Marriage, and Remarriage

Sec. 1. When marital unity is imperiled by dissension, it shall be the duty, if possible, of either or both parties, before taking legal action, to lay the matter before a Member of the Clergy; it shall be the duty of such Member of the Clergy to act first to protect and promote the physical and emotional safety of those involved and only then, if it be possible, to labor that the parties may be reconciled.

Sec. 2 (a) Any member of this Church whose marriage has been annulled or dissolved by a civil court may apply to the Bishop or Ecclesiastical Authority of the Diocese in which such person is legally or canonically resident for a judgment as to his or her marital status in the eyes of the Church. Such judgment may be a recognition of the nullity, or of the termination of the said marriage; *Provided*, that no such judgment shall be construed as affecting in any way the legitimacy of children or the civil validity of the former relationship.

  (b) Every judgment rendered under this Section shall be in writing and shall be made a matter of permanent record in the Archives of the Diocese.

Sec. 3. No Member of the Clergy of this Church shall solemnize the marriage of any person who has been the husband or wife of any other person then living, nor shall any member of this Church enter into a marriage when either of the contracting parties has been the husband or the wife of any other person then living, except as hereinafter provided:

  (a) The Member of the Clergy shall be satisfied by appropriate evidence that the prior marriage has been annulled or dissolved by a final judgment or decree of a civil court of competent jurisdiction.

  (b) The Member of the Clergy shall have instructed the parties that continuing concern must be shown for the well-being of the former spouse, and of any children of the prior marriage.

  (c) The Member of the Clergy shall consult with and obtain the consent of the Bishop of the Diocese wherein the Member of the Clergy is canonically resident or the Bishop of the Diocese in which the Member of the Clergy is licensed to officiate prior to, and shall report to that Bishop, the solemnization of any marriage under this Section.

  (d) If the proposed marriage is to be solemnized in a jurisdiction other than the one in which the consent has been given, the consent shall be affirmed by the Bishop of that jurisdiction.

Sec. 4. All provisions of Canon I.18 shall, in all cases, apply.

2. A Review of General Convention Legislation

Introduction

The legislative history here shows the development of General Convention deliberations about the place of gay men and lesbians in the life of the Church, particularly with regard to the blessing of their faithful, monogamous, lifelong relationships. Successive conventions have both acknowledged the work of their predecessors and reached new decisions.

Resolution texts are from the website of the Archives of the Episcopal Church: http://www.episcopalarchives.org/e-archives/acts/.

Minneapolis, 1976: For the first time, General Convention adopted a resolution that acknowledged and affirmed the presence of persons of homosexual orientation in the Church.

> Resolution 1976–A069:
>
> *Resolved*, the House of Bishops concurring, That it is the sense of this General Convention 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.

Anaheim, 1985: General Convention reaffirmed the 1976 resolution and encouraged dioceses to deepen understanding.

> Resolution 1985–D082:
>
> *Resolved*, the House of Bishops concurring, That the 68th General Convention urge each diocese of this Church to find an effective way to foster a better understanding of homosexual persons, to dispel myths and prejudices about homosexuality, to provide pastoral support, and to give life to the claim of homosexual persons "upon the love, acceptance, and pastoral care and concern of the Church" as recognized by the General Convention in 1976.

Phoenix, 1991: General Convention affirmed the traditional understanding of marriage as between a man and a woman, and acknowledged "discontinuity" between that teaching and the experience of many members of the Episcopal Church.

> Resolution 1991–A104:
>
> *Resolved*, the House of Deputies concurring, That the 70th General Convention of the Episcopal Church affirms that the teaching of the Episcopal Church is that physical sexual expression is appropriate only within the lifelong monogamous "union of husband and wife in heart, body, and mind" "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" as set forth in the Book of Common Prayer; and be it further

Resolved, That this Church continues to work to reconcile the discontinuity between this teaching and the experience of many members of this body; and be it further

Resolved, That this General Convention confesses our failure to lead and to resolve this discontinuity through legislative efforts based upon resolutions directed at singular and various aspects of these issues; and be it further

Resolved, That this General Convention commissions the Bishops and members of each Diocesan Deputation to initiate a means for all congregations in their jurisdiction to enter into dialogue and deepen their understanding of these complex issues; and further this General Convention directs the President of each Province to appoint one Bishop, one lay deputy and one clerical deputy in that province to facilitate the process, to receive reports from the dioceses at each meeting of their provincial synod and report to the 71st General Convention; and be it further

Resolved, That this General Convention directs the House of Bishops to prepare a Pastoral Teaching prior to the 71st General Convention using the learnings from the diocesan and provincial processes and calling upon such insight as is necessary from theologians, theological ethicists, social scientists and gay and lesbian persons; and that three lay persons and three members of the clergy from the House of Deputies, appointed by the President of the House of Deputies be included in the preparation of this Pastoral Teaching.

Indianapolis, 1994: General Convention added sexual orientation, along with marital status, sex, disabilities, and age as categories to which non-discrimination in Church membership is assured.

Resolution 1994–C020:

Resolved, the House of Bishops concurring, That Title I, Canon 17, Section 5 be amended as follows:

> No person shall be denied rights, status [in], or [access to] an equal place in the life, worship, and governance of this Church because of race, color, [or] ethnic origin, national origin, marital status, sex, sexual orientation, disabilities or age, except as otherwise specified by [this] Canon.

Indianapolis, 1994: General Convention called for a study of "the theological foundations and pastoral considerations involved in the development of rites honoring love and commitment between persons of the same sex."

Resolution 1994–C042:

Resolved, the House of Deputies concurring, That the 71st General Convention direct the Standing Liturgical Commission and the Theology Committee of the House of Bishops to prepare and present to the 72nd General Convention, as part of the Church's ongoing dialogue on human sexuality, a report addressing the theological foundations and pastoral considerations involved in the development of rites honoring love and commitment between persons of the same sex; and be it further

Resolved, That no rites for the honoring of love and commitment between persons of the same sex be developed unless and until the preparation of such rites has been authorized by the General Convention; and be it further

Resolved, That the sum of $8,600 be appropriated to support this work, subject to funding considerations.

Philadelphia, 1997: General Convention reaffirmed the traditional understanding of marriage and called for continuing study.

Resolution 1997–C003:

Resolved, That this 72nd General Convention affirm the sacredness of Christian marriage between one man and one woman with intent of life-long relationship; and be it further

Resolved, That this Convention direct the Standing Liturgical Commission to continue its study of theological aspects of committed relationships of same-sex couples, and to issue a full report including recommendations of future steps for the resolution of issues related to such committed relationships no later than November 1999 for consideration at the 73rd General Convention.

Denver, 2000: General Convention acknowledged relationships other than marriage.

Resolution 2000–D039:

Resolved, That the members of the 73rd General Convention intend for this Church to provide a safe and just structure in which all can utilize their gifts and creative energies for mission; and be it further

Resolved, That we acknowledge that while the issues of human sexuality are not yet resolved, there are currently couples in the Body of Christ and in this Church who are living in marriage and couples in the Body of Christ and in this Church who are living in other life-long committed relationships; and be it further

Resolved, That we expect such relationships will 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; and be it further

Resolved, That we denounce promiscuity, exploitation, and abusiveness in the relationships of any of our members; and be it further

Resolved, That this Church intends to hold all its members accountable to these values, and will provide for them the prayerful support, encouragement, and pastoral care necessary to live faithfully by them; and be it further

Resolved, That we acknowledge that some, acting in good conscience, who disagree with the traditional teaching of the Church on human sexuality, will act in contradiction to that position; and be it further

Resolved, That in continuity with previous actions of the General Convention of this Church, and in response to the call for dialogue by the Lambeth Conference, we affirm that those on various sides of controversial issues have a place in the Church, and we reaffirm the imperative to promote conversation between persons of differing experiences and perspectives, while acknowledging the Church's teaching on the sanctity of marriage.

Minneapolis, 2003: Acknowledging continuing differences, General Convention recognized "that local faith communities are operating within the bounds of our common life as they explore and experience liturgies celebrating and blessing same-sex unions."

Resolution 2003–C051:

Resolved, That the 74th General Convention affirm the following:

1. That our life together as a community of faith is grounded in the saving work of Jesus Christ and expressed in the principles of the Chicago–Lambeth Quadrilateral: Holy Scripture, the historic Creeds of the Church, the two dominical Sacraments, and the Historic Episcopate.

2. That we reaffirm Resolution A069 of the 65th General Convention (1976) 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."

3. That, in our understanding of homosexual persons, differences exist among us about how best to care pastorally for those who intend to live in monogamous, non-celibate unions; and what is, or should be, required, permitted, or prohibited by the doctrine, discipline, and worship of The Episcopal Church concerning the blessing of the same.

4. That we reaffirm Resolution D039 of the 73rd General Convention (2000), that "We expect such relationships will 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," and that such relationships exist throughout the church.

5. That we recognize that local faith communities are operating within the bounds of our common life as they explore and experience liturgies celebrating and blessing same-sex unions.

6. That we commit ourselves, and call our church, in the spirit of Resolution A104 of the 70th General Convention (1991), to continued prayer, study, and discernment on the pastoral care for gay and lesbian persons, to include the compilation and development by a special commission organized and appointed by the Presiding Bishop, of resources to facilitate as wide a conversation of discernment as possible throughout the church.

7. That our baptism into Jesus Christ is inseparable from our communion with one another, and we commit ourselves to that communion despite our diversity of opinion and, among dioceses, a diversity of pastoral practice with the gay men and lesbians among us.

8. That it is a matter of faith that our Lord longs for our unity as his disciples, and for us this entails living within the boundaries of the Constitution and Canons of The Episcopal Church. We believe this discipline expresses faithfulness to our polity and that it will facilitate the conversation we seek, not only in The Episcopal Church, but also in the wider Anglican Communion and beyond.

Anaheim, 2009: The General Convention directed the Standing Commission on Liturgy and Music to "collect and develop theological and liturgical resources" for blessing same-gender relationships.

Resolution 2009–C056:

Resolved, the House of Deputies concurring, That the 76th General Convention acknowledge the changing circumstances in the United States and in other nations, as legislation authorizing or forbidding marriage, civil unions or domestic partnerships for gay and lesbian persons is passed in various civil jurisdictions that call forth a renewed pastoral response from this Church, and for an open process for the consideration of theological and liturgical resources for the blessing of same-gender relationships; and be it further

Resolved, That the Standing Commission on Liturgy and Music, in consultation with the House of Bishops, collect and develop theological and liturgical resources, and report to the 77th General Convention; and be it further

Resolved, That the Standing Commission on Liturgy and Music, in consultation with the House of Bishops, devise an open process for the conduct of its work inviting participation from provinces, dioceses, congregations, and individuals who are engaged in such theological work, and inviting theological reflection from throughout the Anglican Communion; and be it further

Resolved, That bishops, particularly those in dioceses within civil jurisdictions where same-gender marriage, civil unions, or domestic partnerships are legal, may provide generous pastoral response to meet the needs of members of this Church; and be it further

Resolved, That this Convention honor the theological diversity of this Church in regard to matters of human sexuality; and be it further

Resolved, That the members of this Church be encouraged to engage in this effort.

Indianapolis, 2012: In Resolution A049, the General Convention commended the resource "I Will Bless You, and You Will Be a Blessing" for study and use, authorized the liturgy for provisional use, and called for a process of review and further development of the theological resources. In addition, in Resolution A050, the General Convention called for a task force to explore understandings of marriage, including attention to legislation authorizing or forbidding same-sex marriage.

Resolution 2012–A049

Resolved, the House of Deputies concurring, That the 77th General Convention commend "Liturgical Resources I: I Will Bless You and You Will Be a Blessing" for study and use in congregations and dioceses of The Episcopal Church, with the following revisions:

Throughout "I Will Bless You and You Will Be a Blessing" change "same-gender" to "same-sex"

Blue Book p. 184: change "Resources for Blessing Same-Gender Relationships" to "Resources for The Witnessing and Blessing of a Lifelong Covenant in a Same-Sex Relationship"

Blue Book p. 240: Add rubric after first rubric, stating: "At least one of the couple must be a baptized Christian."

Blue Book p. 240: In paragraph 2, line 1, delete "at least one of whom is baptized"

Blue Book p. 241: In Presider's address to the assembly, delete "come what may" (paragraph 1, line 9)

Blue Book pp. 241–242: In Presider's address to the assembly, delete all of paragraph 2 ("Ahead of them … calls us all to share.")

Blue Book p. 242: In Presider's address to the assembly, change "let us pray, then," (paragraph 3, line 1) to "Therefore, in the name of Christ, let us pray."

Blue Book p. 245: After the bidding for peace in their home and love in their family, add the following bidding: "For the grace, when they hurt each other, to recognize and acknowledge their fault, and to seek each other's forgiveness and yours: Lord, in your mercy (or Lord, in your goodness) Hear our prayer."

Blue Book p. 246: Change rubric that begins "After a time of silence" to the following: "The leader may add one or more of the following biddings."

Blue Book p. 247: In Commitment (both forms) line 7, change "I will honor and keep you" to "I will honor and love you"

Blue Book p. 248: In first form of blessing rings, change line 2 to "as signs of the enduring covenant"

Blue Book p. 248: In Blessing of the Couple, add rubric between first and second paragraphs: "The Presider continues with one of the following"

Blue Book p. 248: In Blessing of the Couple, add third paragraph after the "Amen": "or this / God, the holy and undivided Trinity, bless, preserve, and keep you, and mercifully grant you rich and boundless grace, that you may please God in body and soul. God make you a sign of the loving-kindness and steadfast fidelity manifest in the life, death, and resurrection of our Savior, and bring you at last to the delight of the heavenly banquet, where he lives and reigns for ever and ever. Amen."

Blue Book p. 257: In paragraph under E. Vocation, change "1 Samuel 18" to "1 Samuel 3"; and be it further

Resolved, That the 77th General Convention authorize for provisional use "The Witnessing and Blessing of a Lifelong Covenant" from "Liturgical Resources I: I Will Bless You and You Will Be a Blessing" beginning the First Sunday of Advent 2012, under the direction and subject to the permission 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 provide generous pastoral response to meet the needs of members of this Church; and be it further

Resolved, That bishops may authorize adaptation of these materials 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 "Theological Resources for Blessing Same-Sex Relationships," namely, "It shall be within the discretion of any Member of the Clergy of this Church to decline to" preside at any rite of blessing defined herein; 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 conscientious objection to or support for the 77th General Convention's action with regard to the Blessing of Same-Sex Relationships; and be it further

Resolved, That the theological resource for the blessing of a lifelong covenant be further developed by the Standing Commission on Liturgy and Music over the 2013–2015 triennium with specific attention to further engagement with scripture and the relevant categories and sources of systematic theology (e.g., creation, sin, grace, salvation, redemption, human nature); and be it further

Resolved, That the Standing Commission on Liturgy and Music include the work of diverse theological perspectives in the further development of the theological resource; and be it further

Resolved, That the Standing Commission on Liturgy and Music develop an open process to review "I Will Bless You and You Will Be a Blessing," inviting responses from provinces, dioceses, congregations, and individuals from throughout The Episcopal Church and the Anglican Communion, and from our ecumenical partners, and report to the 78th General Convention.

Resolution 2012–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.

Salt Lake City, 2015: In Resolution A054, the General Convention authorized two liturgies for marriage for trial use and the use of "The Witnessing and Blessing of a Lifelong Covenant," thus allowing the marriage of same-sex couples in civil jurisdictions where such marriages are legal. In addition, Resolution A036 revised the marriage canon (Canon I.18; the revised text appears above in Appendix 2), and Resolution A037 requested dioceses and parishes to use the study materials produced by the Task Force on the Study of Marriage established by the 2012 Convention, and called for an expanded task force to continue to study marriage.

Resolution 2015-A036:

Resolved, the House of Deputies 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 at least 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:

(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 nature, purpose, and meaning, as well as the rights, duties and responsibilities of marriage.

Sec. 4. Prior to the solemnization, the parties shall sign the following Declaration of Intention:

We understand the teaching of the church that God's purpose for our marriage is for our mutual joy, for the help and comfort we will give to each other in prosperity and adversity, and, when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God. We also understand that our marriage is to be unconditional, mutual, exclusive, faithful, and lifelong; and we engage to make the utmost effort to accept these gifts and fulfill these duties, with the help of God and the support of our community.

Sec. 5. 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. 6. A bishop or priest may pronounce a blessing upon a civil marriage using any of the liturgical forms authorized by this Church.

Sec. 4Sec. 7. It shall be within the discretion of any Member of the Clergy of this Church to decline to solemnize or bless any marriage.

and be it further

Resolved that this canon shall become effective on the First Sunday of Advent, 2015.

Resolution 2015-A037:

Resolved, the House of Deputies concurring, That the 78th General Convention requests dioceses and parishes use 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 the 78th General Convention directs the Presiding Bishop and President of the House of Deputies to appoint *jointly* 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, who represent the cultural and theological diversity in the Church; 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 be it further

Resolved, That the Task Force consult with (i) individuals and couples within these groups about their experience of faith and church life; and (ii) the results of diocesan and parochial study of "Dearly Beloved" toolkit; and be it further

Resolved, That the Task Force explore biblical, theological, moral, liturgical, cultural, and pastoral perspectives on these matters, and develop written materials about them which represent the spectrum of understanding in our Church and which include responses from theologians, ethicists, pastors, liturgists, social scientists, and educators who are not members of the expanded Task Force, and whose perspectives represent the spectrum of understandings on these matters in our Church; and be it further

Resolved, That the Task Force study and monitor, in consultation 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 educational and pastoral resources for congregational use on these matters that represents the spectrum of understandings on these matters in our 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 $90,000 for the implementation of this resolution.

Resolution 2015-A054:

Resolved, the House of Deputies 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, Liturgy Supplemental Materials: Appendices of the Report of the Standing Commission on Liturgy and Music (BBLSM), pp. 2-151, with the following revisions:

> BBLSM p. 84: In The Commitment, change the rubric to read "Each member of the couple, in turn, takes the right hand of the other and says"

> BBLSM p.84: After "I N., give myself to you, N." add ", and take you to myself."

> BBLSM p. 85: At the Pronouncement, change the rubric to read "The Presider joins the right hands and says"

BBLSM p. 87: In Concerning the Service, change the second paragraph to read "At least one of the couple must be a baptized Christian, and the marriage shall conform to the laws of the state and canons of this church."

BBLSM p. 88: Under Gathering, change the rubric to read "The couple joins the assembly."

BBLSM p. 89: Change "In marriage according to the laws of the state [or civil jurisdiction] of X" to "In marriage [according to the laws of the state or civil jurisdiction of X]"

BBLSM p. 89: Change "Solemnize their marriage according to the laws of the state [or civil jurisdiction] of X" to "are married [according to the laws of the state or civil jurisdiction of X]"

BBLSM p.94: After "I N., give myself to you, N." add ", and take you to myself."

BBLSM p. 95: At the Pronouncement, change the rubric to read "The Presider joins the right hands of the couple and says"

BBLSM p. 95: Replace "I pronounce that they are married according to the laws of the state [or civil jurisdiction] of X" to "I pronounce that they are married [according to the laws of the state or civil jurisdiction of X]"

BBLSM p. 100: At The Marriage, change the rubric to read "Each member of the couple, in turn, takes the right hand of the other and says"

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" (as found in Supplemental Materials: Appendices of the Report of the Standing Commission on Liturgy and Music, pp. 77-86, as amended)" beginning the First Sunday of Advent 2015; under the direction and with the permission of the bishop exercising ecclesiastical authority; and be it further

Resolved, That the 78th General Convention authorize for trial use in accordance with Article X of the Constitution and Canon II.3.6 "The Witnessing and Blessing of a Marriage," and "The Celebration and Blessing of a Marriage 2," from "Liturgical Resources I: I Will Bless You and You Will Be a Blessing, Revised and Expanded 2015" (as found in Supplemental Materials: Appendices of the Report of the Standing Commission on Liturgy and Music, pp. 87-105) beginning the First Sunday of Advent 2015. Bishops exercising ecclesiastical authority or, where appropriate, ecclesiastical supervision will make provision for all couples asking to be married in this Church to have access to these liturgies. Trial use is only to be available under the direction and with the permission of the Diocesan Bishop; and be it further

Resolved, That bishops 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, and the Custodian of the Standard Book of Common Prayer 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 with Church Publishing of the material (in English and Spanish) 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, these materials to be available electronically at no cost.

*Canon I.18.4 refers to the 2012 Constitution and Canons; a comparable provision is contained in Canon I.18.7 of the 2015 Constitution and Canons.

The full text of the Liturgical Resources 2 can be found at the below link.

[Liturgical Resources 2 - Full Text](#)

MINORITY REPORT

A More Excellent Way? A Minority Report

BY JORDAN HYLDEN

I am grateful to our church's presiding officers for appointing me as a member of this triennium's marriage task force. In our enabling resolution (2015-A037), the General Convention called for appointments that reflect the "theological diversity in the Church." That was judged to include me, as the one appointed (as I take it) to represent those in our church who find the 1979 BCP to be a faithful rendering of the witness of Scripture and the catholic Church on marriage as "a solemn and public covenant between a man and a woman" (BCP, 422). I was glad to serve, but felt a need to write this minority report as I cannot affirm what my Task Force colleagues propose, in particular passing on first reading the addition of gender-neutral marriage liturgies to the Prayer Book along with revisions consistent with this to the BCP Catechism. In what follows, I will explain my concerns.

They fall into three chief areas: the nature of the deliberative process we as a church have undertaken; the proposed rites themselves as set within a wider discussion of Prayer Book revision; and the effects that Prayer Book revision at this time may have on our efforts to live into "communion across difference" as one church that includes all Episcopalians, walking together with our Anglican Communion sisters and brothers.

DELIBERATIVE PROCESS CONCERNS

First, I would like to suggest that it was not adequate to General Convention's intent to appoint only one (white, married, heterosexual) person on this Task Force to represent the traditional view. Two to four out of our fifteen would have been better. While my colleagues were gracious, they recognized that my position on the committee was a difficult one. It would have been helpful, I suggest, also to include Episcopalians such as Dr. Wesley Hill, a celibate gay man who has written extensively on marriage and sexuality; and Bishop Lloyd Allen of Honduras, a respected leader in Province IX who holds the traditional view of marriage.

While I was glad to be included, I felt inadequate as a white person to speak for the non-white members of our church who hold a traditional view of marriage. We saw in 2015 that most of our Latin American sisters and brothers in Province IX did not vote in favor of authorizing new rites for same-sex marriage. While one of our number was from Venezuela, he supported the progressive view of marriage; moreover, the political situation in his country prevented him from participating in many of our sessions. I am grateful that the Province IX bishops responded to our invitation to submit a reflection. Their statement makes clear their traditional view of marriage, grounded in Holy Scripture, and urges our church to avoid revising it in our Prayer Book. "If the Church approves these changes," they write, "they are greatly deepening the breach, the division, and the Ninth Province will have to

learn how to walk alone." These are clearly significant words, and I am troubled by a deliberative process that does not take the time to listen well to the concerns of this community. In recent decades, we in TEC have emphasized our character as a multi-national, diverse church, but I fear that we have not acted this way in our deliberative process, in which native-English-speaking Anglo-Americans seem to do most of the talking and not always enough listening.

I must mention also indigenous and non-white U.S. communities who tend in a more traditional direction. Our survey of congregations included one largely Afro-Caribbean parish, which finds itself a conservative outlier in its largely white and progressive diocese. They reported that they would likely face significant departures and fractures if the BCP marriage service is revised. I imagine there are other similar voices in our church, but I fear that they have not been consulted. We should be wary, I think, of reproducing mistakes from our past. In 2000 (Resolution B034), General Convention apologized for the way in which it effected the transition to the 1979 prayer book, noting that many indigenous peoples experienced this as an occasion of harsh cultural superiority.

As a matter of principle, I submit that whenever our church undertakes revision in a substantial doctrinal matter, we ought to build meaningful conversation into our deliberative process with those who hold the received position, as well as with those who hold it should be revised. This conversation must I think take particular care to listen to the voices of non-white persons and all the nations of TEC. This I think is true not only for marriage, but also for other issues of substance, such as the evergreen question of whether our canons should permit the communion of the unbaptized. Although our enabling resolution (2015: A037) called for this Task Force to "represent the cultural and theological diversity in the Church," I do not think this intention was realized.

When we *do* decide to revise our teaching, a genuinely inclusive conversation may allow us to find space for all members and communities of our church. As far as I can tell, all of our Anglican Communion and full-communion ecumenical partners who have moved ahead on some such doctrinal issue in recent years (such as the ELCA, the Church of England, and the Anglican Church in Aotearoa, New Zealand and Polynesia) have built this kind of conversation into their deliberative process, and the result has been a way forward that allowed most (if not all) to move forward together in good conscience as one church. I submit that if we move forward, we need a more truly inclusive conversation about how we are to live together in "good disagreement" with "communion across difference" as a diverse, multi-national church.

PRAYER BOOK REVISION CONCERNS: PROCESS AND SUBSTANCE

My second chief difficulty concerns the notion of what some call "piecemeal" or "surgical" Prayer Book revision, as set within the larger discussion on revision carried forward by the SCLM.

First, there is the question of whether the Trial Use rites have been sufficiently received in the Church, so as to recommend inclusion in our Prayer Book. I have spoken to several colleagues in TEC who are in favor of revising our practice of marriage, but who are nonetheless not sure that the current Trial Use rites are seasoned enough to merit inclusion in the BCP at this time.

Traditionally, of course, proposals for prayer book revision come from the SCLM, rather than from a special task force. There are good reasons for this. The SCLM as a standing committee is charged with seeing the 'big picture' of stewarding our church's authorized worship, rather than any particular portion thereof. It is unwise, it seems to me, for special task forces to propose their own changes to the Prayer Book. Might we have another task force propose that we add a sentence in the Baptismal Covenant about stewardship of creation? Perhaps we should make this change and many others; but it does not seem wise to publish new Prayer Books every few years to keep up with new "surgical" changes that "we absolutely *must* make"—or so I can already hear it being said.

Speaking for myself, I think that the Cranmerian "Dearly beloved" exhortation in our Prayer Book represents a catholic and ecumenical theology responsive to the whole witness of canonical Scripture, displaying the resonance between creation and covenant in the sacrament of marriage. This I see in the Prayer Book's dramatic presentation of male and female made in God's image coming together as one flesh, joined as man and wife, charged to be fruitful and multiply and thereby participate in God's creative act by passing along God's gift of life to the next generation (Genesis 1-2); and all of this as mysteriously signifying to us the fruitful union between Christ and his Church (Eph. 5), the countless children of whom number as many as the stars in Abraham's sky.

From this perspective, I see problems with "The Celebration and Blessing of a Marriage 2," proposed for inclusion in the BCP:

- The reference to marriage as a bond "established by God in creation" in the "Dearly beloved" exhortation is cut, thus removing the resonance between creation and covenant.

- "Procreation of children" is replaced with "the gift of children." As the Church of England's lengthy response to our proposals points out, this arguably is a significant change of the doctrine of marriage.

- The prayer at the Ministry of the Word replaces "you have created us male and female in your image" with "you have created humankind in your image." This is a distancing from biblical language.

- The recommended Scripture readings are changed; though other readings remain permissible. Gen. 2:4-9, 15-24 is gone (referencing created sexual complementarity: bone of my bones and flesh of my flesh; the man shall cleave to his wife and they shall become one flesh); Eph. 5:21-33 is gone, leaving only Eph. 5:1-2 (the cut portion includes submitting to one another out of reverence for Christ, and the citation of Gen. 2:24 [becoming one flesh] as a profound mystery that signifies Christ and the church). Mark 10:6-9, 13-16 is also omitted, which is where Jesus cites Genesis 1:27 ("he made them male and female") and 2:24 ("one flesh"), saying that what God has joined together let no man separate. Omitting these suggested readings would seem to be an admission that the new rite is in significant tension with the plain sense of those biblical passages.

It would seem that these changes sit uncomfortably with the historic words of Article 20 on the authority of the church: "It is not lawful for the Church to ordain anything that is contrary to God's

Word written, neither may it so expound one place of Scripture, that it be repugnant to another." In other words: it would seem like authorizing this rite is precisely what Article 20 said that the church does not have authority to do.

To authorize a marriage service as the doctrine and common prayer of our church that would appear to sit in significant tension with Holy Scripture and our Lord is a matter not to be entered into unadvisedly or lightly. As the Church of England notes in their official response to the Task Force's proposals, this would represent "a very big step to have taken unilaterally" that constitutes "a clear divergence from the understanding of marriage held throughout the history of the Christian church itself and by the great majority of Anglicans, and other Christians, today." If some will conclude that revising our marriage practice is not disobedient to our Lord—and I trust that progressive Christians do not intend to disobey our Lord—then surely they might recognize that there will be other Christians whose consciences are bound in obedience to our Lord as they understand him, not to mention the discernment of the wider Anglican Communion and catholic Church of which we claim to be a part.

As one who conscientiously holds this view under the authority of Scripture, I feel duty-bound to make this case. However, I understand most of my sisters and brothers in TEC are not persuaded by it, and hold their views conscientiously as well, under Scripture as they read it. I also understand that many lesbian and gay persons bear witness that they experience God's blessing on their lifelong, committed unions, and that the traditional view of marriage has been used by too many Christians to justify unjustifiable discrimination and abuse of same-sex attracted persons. It is my sincere hope that we can find a way to flourish together as faithful members of one church, united against homophobic prejudice, in which we all have a place as beloved children of God.

CONCERNS REGARDING DOCTRINE, "COMMUNION ACROSS DIFFERENCE," AND ANGLICAN RELATIONS

My final area of concern is to do with the effects Prayer Book revision may have on our own efforts to live into "communion across difference" as Episcopalians (as the 2015 House of Bishops statement expressed it), "walking together" with our Anglican sisters and brothers around the Communion, as our Presiding Bishop committed to at the 2016 Primates' Meeting.

It is often said that our church puts great stock in the phrase *lex orandi, lex credendi:* the law of prayer is the law of belief. In *The Oxford Guide to the Book of Common Prayer,* Bishop Pierre Whalon writes: "To include a rite, or a text, in a Book of Common Prayer or its functional equivalent is to make *de facto* a doctrinal statement." Ordinands in our church vow to conform to the "doctrine, discipline, and worship of the Episcopal Church," and doctrine is defined in our canons as:

> "the basic and essential teachings of the Church… 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" (IV.2).

What the Task Force is proposing then is not just an addition of liturgical options. Rather, the Task Force proposes to change the doctrine of The Episcopal Church.

Other Anglican provinces and full-communion ecumenical partners, as the responses received by this Task Force make clear, have managed to avoid such an all-or-nothing option. The Scottish Episcopal Church, as they tell us, includes its 1929 Prayer Book as only one among several texts authorized by canon that together "set the baseline of doctrine." We could take such a route, making our 1979 book our historic text alongside of which other authorized texts have their place (as indeed we already do, to some extent, with 1928 and *EOW* texts, but without sound constitutional and canonical basis). Such a route would arguably take the air out of the zero-sum game of prayer book revision that has in the past proven divisive, allow breathing room for experimentation, and address the concern that anything not in the BCP is of "second-class" status. Many and perhaps most Anglican provinces have already taken this route, including those of England, Scotland, Ireland, South Africa, Canada, Australia, and New Zealand.

Finally, I see no reason why General Convention mightn't seek out creative solutions that are responsive *both* to LGBTQ+ inclusion as this church has discerned it *and* to our resolve to "walk together" as closely as possible with our fellow Anglicans around the world.

Bishop Whalon, in the *Oxford Guide,* goes on to note that "in light of rapid changes in the Communion … the work of establishing basic theological principles that apply throughout the Anglican world can no longer be evaded." "Perhaps the way forward," he suggests, following the lead of Lambeth 1988, "would be a commission … widely representative of the whole Communion," which could "issue guidelines for creating and revising Prayer Books," to which "all the provinces could agree to submit their proposed revisions for judgment." Such a proposal is I think sound. We have received what we call *The Book of Common Prayer*, rather than created it anew; and we claim in our Catechism to be not just a national denomination but part of the one Church of the creeds: one, holy, catholic and apostolic.

As the Church of England reminds us in their response, "changing doctrine is, we believe, a matter that must be undertaken in a highly consultative and ecumenical manner across the major Christian churches of the world as well as among Anglicans globally." They note also that our actions in this arena are likely to have consequences for our relationship with the historic see of Canterbury, full communion with which our Constitution understands as constitutive of our Anglican identity. The Anglican Church of Australia adds in their response that "there is little question that changing the doctrine of marriage is a matter of grave consequence, indeed a church dividing matter." For this reason, they suggest that this issue is "wrongly handled at a doctrinal level if it involves a redefinition of the doctrine of marriage but rightly handled with pastoral and liturgical resources." I suggest that there may be ways to be responsive to these concerns from most global Anglicans, while also being responsive to the discernment of most Episcopalians at the last General Convention that LGBTQ+ inclusion demanded changes in the liturgical options available in this church.

The experience of the Evangelical Lutheran Church in America (ELCA) may prove a helpful guide, as their response sketches out. In their 2009 teaching document "Human Sexuality: Gift and Trust," the ELCA carefully made space for those whose "bound consciences" lead them to affirm same-sex marriage *and* for those who cannot do so.

The ELCA's more congregation-centered polity would need some translating into our own episcopal polity and catholic ecclesiology, to be sure. Yet it seems clear to me that something along these lines might preserve a space for everyone in our church, taking the air out of the constant all-or-nothing battles that have proven so divisive, and allow us to re-focus our energies on evangelism and mission, as both our Presiding Bishop and the Archbishop of Canterbury invite us to do. As the Church of England urges us to consider, "the quality of provision made for those who dissent from the majority view can mean the difference between bitter splits and continuing to walk together as one church which is large enough to honor difference."

CONCLUSION

To conclude, I note that there are a number of items in the academic essays with which I cannot concur. While our conversations were collegial, the larger Task Force did not judge that some of my concerns and suggestions should be incorporated into the final text. While I regret this, it is likely not possible to formulate a consensus text if one member is of widely divergent views. I also note that I do not concur with the Task Force's proposed resolutions on developing resources for non-marital sexual relationships, and authorizing rites to bless non-marital lifelong relationships.

We have, so it seems to me, a way forward at hand that would allow every Episcopalian in the pews to go on worshiping and praying together, even with our painful divisions and distinctions, until such time as our Lord chastens us all. It would be easier, more tidy, to impose a uniform code upon all dissenters. And it might be easier to finish the secession once and for all, so that we all can live in a church in which everyone agrees with us.

But the Gospel of John testifies that "the Word became flesh and dwelt among us, full of grace and truth" (John 1:14). Being a church full of both grace *and* truth is a difficult and rare thing. If we are to remain Christ's Church, there is no easy way forward—but there may be a "more excellent" way, full of both grace and truth. So I hope.

The Rev. Canon Jordan Hylden is canon theologian of the Diocese of Dallas. Portions of the third section and conclusion of this essay previously appeared in The Living Church, *co-authored with The Rev. Keith Voets of the Diocese of Long Island.*

TASK FORCE TO STUDY CHURCH LEADERSHIP AND COMPENSATION

Membership

Ms. Diane B. Pollard, *Chair*	New York II	2018
Mr. David Quittmeyer, *Vice-Chair*	Central Gulf Coast	2018
Ms. Barbara Miles, *Secretary*	Maryland	2018
Canon Bonnie Anderson	Michigan	2018
The Rev. Canon Stephen Carpenter	California	2018
Canon Judith Conley	Arizona	2018
The Rt. Rev. Carol Gallagher	Montana	2018
Mr. Scott K. Haight	West Tennessee	2018
The Rt. Rev. William Klusmeyer	West Virginia	2018
The Rev. Ellen Tillotson	Connecticut	2018
The Rt. Rev. James Waggoner, Jr.	Spokane	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	

CHANGES IN MEMBERSHIP

There were two (2) changes in the membership of the Task Force during the triennium: the resignation of the Rev. W. Frank Allen, and the addition of the Rt. Rev. James Waggoner, Jr.

Mandate

The Task Force was established by Resolution D013 of the 78th General Convention, meeting in Salt Lake City in July 2015. The Resolution called for the President of the House of Deputies ("PHoD") and the Presiding Bishop jointly to appoint a Task Force to consider the duties and compensation of the leadership of the General Convention, given the following:

- that the structures of The Episcopal Church are evolving;
- that there are increased demands on the time and energy of the President of the House of Deputies;
- that the President serves as Vice President of the Domestic and Foreign Missionary Society [DFMS] and as Vice-Chair of the Executive Council, among other duties;
- that the Convention considers it important that the House of Deputies be able to choose a President without regard to financial circumstances of the candidates for office;
- that the House of Deputies has affirmed the desirability of compensation for the President; and
- that the House of Bishops understands and appreciates the cogency of, and fairness issues inherent in the position of the House of Deputies.
- Recommendations of the Task Force are to be reported to the 79th General Convention.

Summary of Work

The initial Task Force meeting took place on November 18 – 21, 2015 at the Maritime Institute in Linthicum Heights, Maryland. The meeting was an orientation gathering for all Interim Bodies and gave the Task Force an opportunity to interact with colleagues of other Interim Bodies. The Task Force used this meeting time to craft the agenda for the work in the triennium and began to seek input from other Interim Bodies, leadership, Deputies and Bishops, and other individuals of all orders of ministry about the history and range of responses to D013. A number of archival investigations and writings relevant to the history and development of the public duties and visibility of the PHoD were also assigned for study. The Task Force met three (3) additional times; twice in-person and once electronically.

Through its interviews and study of the roles and duties of previous PHoDs, the Task Force confirmed that there are significant barriers to the ability of the House of Deputies to choose its leadership freely. In particular, the lack of any monetary compensation is a limiting factor in choosing a PHoD based on gifts and skills, as opposed to being restricted by the age and personal economic circumstances of potential candidates. This is not good stewardship of the human resources that are available to us as potential leaders. Further, there may be a lack of a comprehensive understanding of the negative implications of these circumstances to the governance of the church from both a historic and contemporary perspective.

Based on these findings, the Task Force set out to assemble from governing documents of The Episcopal Church a comprehensive description of the actual work and duties of the PHoD. We also ascertained that the work required such time as to forestall any gainful employment by the incumbent. Indeed, we learned that no PHoD has held regular paid employment since the election in 1985 of the Very Rev. David Collins, who retired early at age sixty-two (62) from his position as Dean of the Cathedral in Atlanta in order to adequately carry out his duties as PHoD.

In reviewing and preparing the job description, the Task Force also noted that the PHoD is a Vice President of the Domestic and Foreign Missionary Society [DFMS], and the only such officer not to be paid. As an officer, agent, and fiduciary of the DFMS, the PHoD is responsible for the assets of The Episcopal Church and must undergo certain required background and financial checks.

The Task Force observed in the course of its study that the Canons of The Episcopal Church already call for the Executive Council to fix a salary for all officers, agents and employees of Executive Council and for all agents and employees of the DFMS (Canon I.4.5(c)). Under this provision, the PHoD, as Vice President of Executive Council and Vice President of the DFMS, is canonically entitled to a salary. The Task Force considered that this canonical provision resolves the question entirely. After further consideration, however, in light of the way the question came up in D013 as a resolution of General Convention, the consensus of the Task Force was that it would be prudent to clarify and affirm the

salary issue in a direct way by resolution recommended for adoption by the 79th General Convention in 2018.

The Task Force also considered other matters related to the Office of the PHoD, some of which might require canonical changes and some of which might be addressed adequately through either Rules of Order or by action of Executive Council. These matters include:

A formal process for nominating candidates for the Office.

Because there is at present no formal process for screening or "vetting" candidates for the Office of PHoD, the required background and financial checks were performed for the incumbent PHoD after election.

The Task Force feels strongly that individuals who are candidates for positions – volunteer or paid – should be subject to the normal background checks as prescribed for employees of organizations who will have fiscal and fiduciary responsibilities. The Task Force met with the Joint Committee on Nominations to share this finding with them and to ascertain what might be needed to develop such a process. Subsequently, the Task Force learned that the House of Deputies could set up an internal process to screen potential candidates for PHoD, and that no canonical changes are required to adopt such a process.

The Task Force also discussed the desirability of a periodic "ministry review" process specifically for the PHoD, which might be directed by Executive Council in the course of its business.

The Task Force believes that these process issues should be addressed within current structures.

Therefore, the Task Force on Leadership and Compensation recommends that this General Convention request that the Executive Council exercise its existing canonical mandate to establish and begin compensation for the President of the House of Deputies. It further recommends that the incumbent PHoD consider establishing a Committee of the House as an experimental way to educate and conduct some preliminary screening of potential candidates for the office in the future.

The Task Force has requested the Finance for Mission Committee of Executive Council to make provisional allowance for a PHoD salary in the draft budget that it will submit to the Joint Committee on Program Budget and Finance for action at General Convention. The Task Force is not recommending a specific amount, but believes that the amount should be determined through the methods currently used by Executive Council in proposing compensation for officers and staff.

Proposed Resolution

RESOLUTION A028 SALARY FOR THE PRESIDENT OF THE HOUSE OF DEPUTIES

Resolved, The House of _____ concurring, that this General Convention recognize that The Episcopal Church's governing documents require the President of the House of Deputies to perform numerous duties that are specified and those that are normally appropriate to the office; and be it further,

Resolved, That this General Convention recognize the continuing evolution of The Episcopal Church and the increased demands on the time and energy of the President of the House of Deputies; and be it further,

Resolved, That this General Convention recognize that there exists a great barrier in identifying and recruiting qualified candidates for President of the House of Deputies because of the lack of compensation for this position, which forecloses other full-time employment; and be it further,

Resolved, That this General Convention recognize that in Resolution D013 the 78th General Convention of The Episcopal Church (2015) affirmed that "the House of Deputies considers it important that [it] be able to choose a President without regard to the financial circumstances of the candidates, [and that] the desirability of compensation for the President of the House of Deputies is a fairness issue," and that "the House of Bishops understands and appreciates the cogency of, and fairness issues inherent in, the position of the House of Deputies"; and be it further,

Resolved, That this General Convention recognize that to have a compensated President of the House of Deputies shows The Episcopal Church's recognition of the importance of the laity and the clergy in the governance of The Episcopal Church; and be it further,

Resolved, That this General Convention recognize that the Canons of the General Convention of The Episcopal Church require that the President of the House of Deputies serves as the Vice-Chair of the Executive Council of the General Convention and as the Vice-President of the Domestic and Foreign Missionary Society [DFMS]; and be it further,

Resolved, that whereas Canon I.4.5(c) provides:

"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 Convention, the salaries of all officers of the Council and of all agents and employees of the Council and the Domestic and Foreign Missionary Society shall be fixed by the Council.",

that this General Convention authorize and direct its Executive Council to fix a salary for the President of the House of Deputies as an officer and agent of the Council and as an agent of the Domestic and Foreign Missionary Society [DFMS].

Explanation

At the end of the 78th General Convention (2015) a Task Force was appointed by the Presiding Bishop and the President of the House of Deputies to consider the issues of leadership and compensation of the President of the House of Deputies, with this Task Force to report its recommendations to the 79th General Convention in 2018.

The Task Force conducted extensive interviews with the Presiding Officers, other officers, former Presidents of the House of Deputies, and long-serving Bishops and Deputies; studied the Canons and other governing documents of The Episcopal Church; and reviewed the circumstances and service of Presidents of the House of Deputies over the past forty (40) years. After much prayerful reflection and discussion, the Task Force came to the conclusion that providing a salary for the President of the House of Deputies is not only a good thing, but also essential for the growth of The Episcopal Church. Moreover, it is demanded by good stewardship of the human resources entrusted to us in those who would devote their full-time service to The Episcopal Church.

The Episcopal Church, at its General Conventions of 1997, 2000, and 2015 attempted to establish and secure by resolutions, as considered and adopted by the House of Deputies at each of these Conventions, a stipend for the President of the House of Deputies. As our church has evolved in many areas, it is now time to compensate the only unpaid Executive Officer in a way that is commensurate with the vital duties performed. The canonical basis and authority directing compensation for the office is already contained in Canon I.4.5(c) regarding the leadership role of the President of the House of Deputies in the Executive Council and in the Domestic and Foreign Missionary Society [DFMS].

This resolution does not attempt to change the position or powers of the President of the House of Deputies, the scope of which is described extensively in the governing documents of The Episcopal Church, but rather intends to compensate for the full-time work that the position demands from the individual who agrees to serve in this role.

Supplemental Materials

Duties and Responsibilities of
President of the House of Deputies,
Vice Chair of the Executive Council, and
Vice President of the Domestic and Foreign Missionary Society [DFMS]

The elected position of President of the House of Deputies includes the additional canonical offices of Vice Chair of Executive Council of General Convention and Vice President of the Domestic and Foreign Missionary Society [DFMS], the nonprofit corporate entity through which The Episcopal Church owns property and does business. These three (3) positions are canonically established and are not divisible. The required duties of these offices are established by governing documents of The Episcopal Church, namely, the Constitution & Canons of The Episcopal Church; the Joint Rules of Order of the House of Bishops and the House of Deputies; the Rules of Order of the House of Deputies; and the By-laws of the Executive Council of General Convention and the Domestic and Foreign Missionary Society.[1]

I. Canonical Bases

A. President of the House of Deputies: There shall be a President of the House of Deputies, who shall perform the duties normally appropriate to the office or as set forth in the Canons. (Canon I.1.1(b)).

B. Vice-Chair of the Executive Council/Board of Directors of the Foreign and Domestic Missionary Society: The President of the House of Deputies is the Vice-Chair of the Executive Council of the General Convention. (Canon I.4.2(b)). The Executive Council of the General Convention also serves as the Board of Directors of the Domestic and Foreign Missionary Society [DFMS]. (Canon I.3, Constitution of the Domestic and Foreign Missionary Society, Article II).

C. Vice President of the Domestic and Foreign Missionary Society: The President of the House of Deputies is a Vice President of the Domestic and Foreign Missionary Society [DFMS]. (Canon I.3, Constitution of the Domestic and Foreign Missionary Society, Article III).

II. Required Duties and Responsibilities

A.   General Convention:

1.   Serves as an *ex-officio* member of every Commission of the General Convention or may appoint a personal representative (Canon I.1.2(e)).

2.   Is an *ex-officio* member of and appoints a member of the Joint Standing Committee on Planning and Arrangements for General Convention with duty to fill vacancies (Joint Rules I.2(e), Joint Rules I.2(b)).

3.   Appoints Lay and Clerical members of Standing Commissions and fills vacancies should such arise (Canon I.1.2(c)).

4.   Appoints one (1) Lay Person and one (1) Presbyter or Deacon to the Joint Standing Committee on Planning and Arrangements (Joint Rules VI.16(a)).

5.   Sets, with the Presiding Bishop, a different date and/or length of General Convention, upon the recommendation of the Joint Standing Committee on Planning and Arrangements, and with the advice and consent of Executive Council (Canon I.1.14(e)).

6.   Refers proposals for legislative consideration to the proper Standing Committee or Special Committee of the House of Deputies (Joint Rules III.11).

7.   Assigns, by joint action with the Presiding Bishop, responsibility to the House of Deputies or the House of Bishops for initiating legislation as the House of Initial Action (Joint Rules III.13(a)).

8.   Makes referrals to Provincial Synods within sixty (60) days after General Convention, with the Presiding Bishop, such subjects as the General Convention directs or the presiding officers (Presiding Bishop and President of the House of Deputies) deem advisable (Canon I.9.11).

9.   Appoints Priests and Deacons and Lay Persons to Task Forces created by General Convention according to the provisions of the Joint Rules and subject to the enabling resolutions (Joint Rules IX).

10.   Is an *ex-officio* member and appoints Lay and Clerical Deputies to the Joint Standing Committee on Program, Budget, and Finance (Joint Rules II.10(a)) and fills vacancies should such arise (Joint Rules I.2(b)).

11.   Appoints Lay Persons and Presbyters to the Joint Standing Committee on Nominations and fills vacancies should such arise (Joint Rules VII.18, Joint Rules I.2(c)).

12.   Appoints two (2) youth representatives as members of the Joint Nominating Committee for the Election of the Presiding Bishop (Canon I.2.1(a)).

13.   Appoints Clerical and Lay Deputies to the Joint Nominating Committee for the Election of the Presiding Bishop when vacancies arise (Canon I.2.1(c)).

14.   May appoint Clergy or Lay Members or staff of the Executive Council, or other experts, to consult with Joint Legislative Committees and Joint Committees (Joint Rules I.2(d)).

15.   Jointly appoints, with the Presiding Bishop, a Treasurer of the General Convention in case of vacancy by death, resignation or otherwise (Canon I.1.7(b)).

16.   Appoints, with the confirmation of General Convention, Clergy and Lay Members to the Board of the Archives of The Episcopal Church and fills vacancies should such arise (Canon I.5.3(c)).

17.   Appoints, with the confirmation of General Convention, Clergy and Lay Persons to the Board for Transition Ministry and fills vacancies should such arise (Canon III.16.1(c), Canon III.16.1(e)).

B.   Duties specifically concerning the House of Deputies:

1.   Serves as presiding officer of the House of Deputies (Canon I.1(a)).

2.   Appoints a Secretary *pro tempore* of the House of Deputies should there be a vacancy during the recess between Conventions (Canon 1.1.1(i)).

3.   Appoints one or more Parliamentarians and Vice-Parliamentarians (HOD Rules V.D.).

4.   Appoints and specifies the duties of one (1) or more Chaplains to the House (HOD Rules V.E).

5.   Appoints Sergeant-at-Arms and necessary assistants (HOD Rules V.F).

6.   Appoints Legislative Committees for the work of the House at General Convention (HOD Rules VIII.A(1)(i)).

7.   Appoints Special Legislative Committees for the work of the House at General Convention (HOD Rules VIII.A(1)(iii)).

8.   Appoints Officers and Assistants of each Legislative Committee (HOD Rules VIII.A(3)(i)).

9.   Appoints Legislative Aides to assist Legislative Committees (HOD Rules VIII.A(3)(iii)).

10.   Appoints other Committees and Conference Committees for the work of the House of Deputies as deemed necessary (HOD Rules IX.A(1)(i)).

11.   Designates Special Committees for the work of the House of Deputies at or between sessions of the General Convention as deemed necessary (HOD Rules X.A).

12.   May submit a Resolution or Memorial to the House of Deputies (HOD Rules VII.D(2)).

13.   Appoints an Advisory Council for consultation and advice in the performance of the duties of the Office of President (Canon I.1.1(b)).

14.   Appoints the Chancellor to the President of the House of Deputies as counselor in matters relating to the discharge of the responsibilities of the President (Canon I.1.1(b)).

C.   **Duties concerning the Book of Common Prayer:**

1.   Affixes signature to the copy of the Book of Common Prayer accepted by the General Convention of this Church which is considered authenticated by the signatures of the Presiding Officers (Presiding Bishop and President of the House of Deputies) and Secretaries of the two (2) Houses of the General Convention and thereby declared to be the Standard Book of Common Prayer of this Church (Canon II.3.1).

2.   Jointly authorizes, with the Presiding Bishop, variations and adjustments to, or substitutions for, or alterations in, any portion of the texts under trial, which seem desirable as a result of such trial use, and which do not change the substance of a rite (Canon II.3.6(c)).

D. **Duties required pursuant to Canon III (Ministry) and Canon IV (Ecclesiastical Discipline):**

1. Appoints one (1) Presbyter and one (1) Lay Person to a committee convened by the Presiding Bishop in the case of irreconcilable differences affecting the pastoral relation between a Bishop and a Diocese (Canon III.12(c)(1)).

2. Receives copies of notices of Accords and Orders pertaining to a Priest or a Deacon (Canon IV.14.12(a)).

E. **Duties required as Vice-Chair of Executive Council of General Convention:**

1. Serves as Vice-Chair of the Executive Council of General Convention (Canon I.4.2(b)).

2. In the absence of the Chair (Presiding Bishop), presides and assumes the duties of the Chair for a meeting of the Executive Council (Canon I.4.2(e) and By-laws IV.2(c)).

3. Reports official acts and activities to the Executive Council (By-laws IV.2(b)(i)).

4. Serves as an *ex-officio* member of all committees of Executive Council established by resolution or By-law (By-laws IV.2(b)(ii)).

5. Serves as a voting member of the Executive Committee of Executive Council (By-laws VII.1(b)(ii)).

6. May call a meeting of the Executive Committee of Executive Council (By-laws VII.3(c)).

7. In the absence of the Chair (Presiding Bishop), presides at meetings of the Executive Committee of Executive Council (By-laws VII.3(e)).

8. Jointly appoints, with the Chair, the Executive Officer of the General Convention, subject to the advice and consent of Executive Council (Canon I.1.13(a)).

9. Jointly nominates, with the Chair, the Chief Operating Officer, subject to the consent of Executive Council (Canon I.4.2(f)).

10. Jointly nominates, with the Chair, the Chief Financial Officer, subject to the consent of Executive Council (Canon I.4.2(g)).

11. Jointly nominates, with the Chair, the Chief Legal Officer, subject to the consent of Executive Council (Canon I.4.2(h)).

12. Jointly nominates, with the Chair, members of all committees, *ad hoc* working groups, and task forces of the Executive Council (Canon I.4.4, By-laws VIII.2(c)).

13. Jointly appoints, with the Chair, Executive Council liaisons to each Standing Commission of General Convention (Canon I.1.2(d)).

14. Jointly appoints, with the Chair, the chairs of each Executive Council Joint Standing Committee (By-laws VIII.3(g)).

15. Jointly nominates, with the Chair, members of the Joint Audit Committee of the Executive Council and the DFMS for election by Executive Council (Canon I.4.3).

16. Jointly nominates, with the Chair, members of the Executive Council Investment Committee (By-laws VIII.4(b)(ii)).

F. **Corporate Officer Duties required as Vice President of the Domestic and Foreign Missionary Society [DFMS]:**

1. Serves as Vice President of the Domestic and Foreign Missionary Society [DFMS] (Canon I.3.III).

2. Jointly nominates, with the Chair, members of the Joint Audit Committee of the Council and the DFMS (Canon I.4.3).

3. Serves *ex-officio* as a member of all committees of the Board of Directors of the DFMS (By-laws V.2(a)(ii)).

4. Performs and fulfills various legal and fiduciary responsibilities required of the position such as receiving service of process on legal proceedings; with other officers being approved under financial and background checks for federal contracting; serving as an authorized signatory of contracts, documents, financial instruments, and checks on behalf of the DFMS;

5. Participates in weekly meetings of the Officers of the DFMS.

6. Maintains a presence at the Episcopal Church Center on a regular basis, including attending such events as meetings of all staff.

7.   Meets, communicates, and consults regularly with the President of the DFMS and other Officers of the corporation.

8.   Maintains relationships and consults with various DFMS staff as appropriate.

G.   Customary Duties "Normally Appropriate to the Office" (Canon I.1.1(b)):

1.   Meets and communicates regularly with the Executive Officer of General Convention who historically (and currently) also serves as the Secretary of the House of Deputies.

2.   Prepares for all aspects of the transaction of business in the House of Deputies.

3.   Builds and maintains relationships with the various canonical or affiliated groups such as The Church Pension Group, Episcopal Relief and Development, the Episcopal Church Women, and the United Thank Offering.

4.   Attends all meetings of Provincial Synods at the meetings immediately preceding the General Convention.

5.   Provides orientation, information, and resources for Deputies and alternate Deputies before and during General Convention.

6.   Subject to the budgetary process, hires and supervises the Executive Assistant to the President of the House of Deputies.

7.   Subject to the budgetary process, hires and supervises other staff and independent contractors supporting the work of the President of the House of Deputies.

8.   Communicates regularly with Deputies and alternate Deputies through communications from the President, the House of Deputies website, a monthly electronic newsletter, and social media.

9.   Serves as preacher, keynote speaker, or presenter at a variety of conferences, programs, and events, when invited to do so to promote the goodwill and mission of The Episcopal Church.

10.   Attends various church-wide events, conferences, and programs, when invited to do so to promote the goodwill and mission of The Episcopal Church.

11.   Confers with deputations and visits dioceses, when invited to do so to promote the goodwill and mission of The Episcopal Church.

III. Legislative Qualifications

The President of the House of Deputies must be a member of the House of Deputies at the time of election to the office. The term is approximately three (3) years, beginning at the adjournment of the General Convention at which elected and ending at the adjournment of the following regular meeting of General Convention. A person may serve up to three (3) consecutive terms as President of the House of Deputies. (Canon I.1.1(b)).

IV. General Qualifications

The President of the House of Deputies should have considerable experience at all levels of governance in the Church. Critical abilities and competencies include:

• The ability to commit to a full-time position requiring frequent travel for a minimum of three (3) years;

• A strong knowledge of the House of Deputies Rules of Order;

• A strong knowledge or ability to become expert in parliamentary procedure;

• The ability to preside effectively and efficiently over a legislative body of approximately eight hundred and eighty-eight (888) people for eight (8) to ten (10) days;

• A deep knowledge of and respect for the polity and mission of the Church;

• Excellent presentation, oral and written communications skills;

• Demonstrated ability to engage in strategic planning with sensitivity to time constraints and resources;

• Demonstrated ability to develop relationships with and discern gifts and skills of church leaders to make the approximately seven hundred (700) required appointments as well as to fill the three hundred (300) "rolling" vacancies relating to those appointments;

• Demonstrated ability to empower individual volunteers as well as groups;

• Experience in collaborative leadership and ministry; and

- The ability to clear required criminal and background checks required for U.S. federal contractors.

Endnotes

[1] Constitution & Canons of The Episcopal Church (2015) ("Canon(s)"); Joint Rules of the House of Bishops and the House of Deputies (2015) ("Joint Rules"); Rules of Order of the House of Deputies (2015) ("HOD Rules"); and the By-Laws of the Executive Council of General Convention and the Domestic and Foreign Missionary Society (adopted June 17, 2011, and revised June 10, 2016) ("By-laws"). The Domestic and Foreign Missionary Society is a New York corporation and is sometimes referred to as the "DFMS."

TASK FORCE TO STUDY DUAL CALL COUPLES

Membership

The Rt. Rev. Douglas Fisher, *Chair*	Western Massachusetts, I	2018
The Rev. Dr. Diane E. Vie, *Vice Chair*	Southwestern Virginia, III	2018
The Rev. Canon Joseph M.C. Chambers	Missouri, V	2018
Canon Catherine Massey	North Carolina, IV	2018
Canon Karen Olson	Minnesota, VI	2018
The Rt. Rev. Brian Seage	Mississippi, IV	2018
The Rev. Kammy Young	Florida, IV	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

Representation at General Convention

Bishop Doug Fisher is authorized to receive non-substantive amendments to this report at General Convention.

Mandate

Resolution 2015-B022:

Resolved, The House of Bishops concurring, that the 78th General Convention calls for a study on the issues of deployment, equality and justice for dual call couples, including the specific issues for bishop-priest couples, for the benefit of this Church; and be it further

Resolved, That a task force be appointed by the Presiding Officers, consisting of no more than seven (7) members that such task force include dual call couples, people currently doing research on this reality and the Office of Pastoral Development; and be it further

Resolved, That this task force be supported by the Office of Pastoral Development and report its findings back to the 79th General Convention.

Summary of Work

MEETINGS

Meetings were held via teleconference, Skype or Zoom on March 17th 2016, May 12th 2016, Oct. 18th 2016, Jan. 25th 2017, March 21, 2017, and Oct. 24, 2017.

WORK COMPLETED

During our initial meeting on March 17th 2016 we agreed we would review the Doctoral Thesis entitled "Double Vows Double Blessing: A Study of Dually Ordained Couples in the Episcopal Church" written by The Rev. Dr. Diane E. Vie and submitted to the faculty of The Virginia Theological Seminary on January 6 2016. We also reviewed statistics on Clergy Couples in the Episcopal Church. The findings below are from Derik Darvis from the Church Pension Fund from October of 2013.

Married Clergy Analysis: Key Findings

Population
- 428 Episcopal priest couples [EPC][1]
  - 400 opposite gender EPC's
  - 28 same-sex EPC's
- **Statistics for *Opposite-Gender* EPC's**
- Age:
  - EPC females' mean age is 57.2 years old
  - EPC males' mean age is 60.4 years old
  - On average, EPC males are 4.5 years older than EPC females
- Salary:
  - $136,122 mean *household* salary for EPC's paying *two* assessments (N=137)
  - $77,529 mean salary for male priest married to a female priest (N=225)
  - $62,389 mean salary for female priest married to a male priest (N=216)
  - Controlling for gender, the difference between EPC and population salaries is *not* statistically significant.[2]
- Assessable Compensation:
  - 67% of EPC women under sixty-five (65) are paying assessments (population = 66%)
  - 74% of EPC men under sixty-five (65) are paying assessments (population = 67%)
- Credited Service:
  - The average EPC female has 12.6 years of CPG Credited Service
  - The average EPC male has 15.9 years of CPG Credited Service
- Parish Size
  - The mean ASA for EPC females is 161
  - The mean ASA for EPC males is 174
  - The male/female ASA difference is not statistically significant
- Position Type:
  - 63% of EPC females under sixty-five (65) are rectors or solo priests, and 24% are assistants (N=201)[3]
  - 73% of EPC males under sixty-five (65) are rectors or solo priests, and 13% are assistants (N=191)[4]

- o Among EPCs where both individuals are under sixty-five (65), 20% are both employed as the rector or solo priest of their congregation (N=283)
- In summary, there are *no substantial differences* between the EPC population and the population of all priests in terms of standard indices such as income, labor force participation, and position type.

Statistics for *Same-Gender* EPC's
- 12 female same-gender EPC's, 16 male same-gender EPC's
- $155,130 mean *household* salary for same-gender EPC's earning *two* salaries with a CPG assessment (N=9)
- The mean salary for a TEC male cleric married to another TEC male cleric is $78,590 (N=12)
- The mean salary for a TEC female cleric married to another TEC female cleric is $74,484 (N=14)
- There are too few same-gender EPC's to make useful comparisons against the population.

The task force is engaged extensively with The Board for Transition Ministry (where Bishop Doug Fisher also serves). In their widely circulated "An Invitation to the Church: to wonder and ponder with The Board for Transitional Ministry" the Board includes this as their second of ten (10) points:

> *Dual Call Couples. Episcopal Clergy include four hundred and twenty-eight (428) dual call couples (both partners are ordained). Approximately fourteen (14) percent of active priests are married to another Episcopal clergy person. (This figure does not include Episcopal clergy married to clergy in other traditions). It is reasonable to expect that this number will continue to grow. In some search processes, dual call couples have been seen as a burden. We see a need for a culture change in which dual call couples are considered a blessing.*

The task force put together a spreadsheet of over eight hundred and ninety (890) names (four hundred and forty-five (445) couples) with contact information of persons who are a part of a clergy couple in The Episcopal Church.

In March of 2017, Diane Vie attended the Transition Ministry Conference at the Duncan Center in Delray Beach Florida wherein she presented topics relating to transition for dual called couples based on work from her thesis, bringing awareness to the Transition Ministers. At the same time Diane collected data from the Transition Ministers on placing dual called couples.

On July 26, 2017 a press release was published introducing a video that the task force presented titled "Dual Call Couples: Gifts and Challenges for the Church."

Task Force to Study Dual Call Couples issues video
Posted July 26, 2017

[Episcopal Church Office of Public Affairs] The Task Force to Study Dual Call Couples has issued the following update on its progress including a video titled "Dual Call Couples: Gifts & Challenges for the Church."

The Task Force to Study Dual Call Couples
The Task Force to Study Dual Call Couples, created by Resolution 2015-B022 at the 78th General Convention in 2015 has released a video titled, "Dual Call Couples: Gifts & Challenges for the Church," available here. The members hope that this will be a useful tool for vestries, search committees and congregations.

The Task Force was appointed by Episcopal Church Presiding Bishop and Primate Michael B. Curry and House of Deputies President the Rev. Gay Clark Jennings. They appointed Bishop Douglas Fisher to chair the group.

"This is an important time for clergy couples in the life of the church," reported the Rev. Dr. Diane Vie of the Diocese of Southwestern Virginia, vice-chair of the Task Force. "The resolution raises the issue to a system wide level of awareness and legitimizes the issue at a systematic level and promises some action moving forward."

The Church Pension Group [CPG] estimated in 2013 that The Episcopal Church is home to approximately four hundred and twenty-eight (428) dual call couples. Approximately fourteen (14) percent of active priests are married to other Episcopal clergy.

As part of its work, the Task Force initiated a listening process. "A big part of what we do is getting the wider Church talking about dual call—the challenges and the opportunities," Fisher said. "We have not made definitive statements—we have invited dialog."

The Task Force reached out to couples in the dioceses of its members and crafted questions for each couple to answer. In the video, couples discuss the real-life challenges faced by priests who are married to other priests: a couple from the Diocese of East Tennessee talks about their joint discernment process and about sharing life together at Sewanee; another from the Diocese of San Diego address sharing a call as co-vicars.

The Task Force hopes these honest reflections from dual call couples will open conversation on the congregational level. The Task Force will make its full report to the 79th General Convention in 2018.

The members of the Task Force to Study Dual Call Couples and their dioceses are: Bishop Douglas Fisher, Western Massachusetts; the Rev. Canon Joseph Chambers, Missouri; Canon Catherine Massey, North Carolina; Canon Karen Olsen, Minnesota; Bishop Brian Seage, Mississippi; the Rev. Dr. Diane Vie, Southwestern Virginia; the Rev.

Kammy Young, Florida; Presiding Bishop Michael Curry, *ex- officio;* President of the House of Deputies the Rev. Gay Clark Jennings, *ex-officio.*

Throughout its time together the task force has discussed the possibility of a conference for dual called couples in the near future. We had been in contact with Credo to see if there was a possibility of the task force and Credo working together on a conference. Credo is offering a conference for Married Clergy Couples September 25 – October 1, 2018. The task force has helped in getting word out about this upcoming conference. It will be the first conference held by Credo for married clergy couples. The Rev.'s Diane and Todd Vie will be attending the Credo conference.

The task force is just now getting to the priest/bishop spouse dimension of our work. We were focusing on the large number of dual call couples before this and that was our priority. We have arranged to have Peggy Treadwell interview priest/bishop spouse couples and to publish their stories in narrative form for reflection by the wider Church in May, 2018.

Budget

Although we have not spent the entire budget yet, we will after the work of Peggy Treadwell and we ask for the same amount for the new triennium.

Continuance Recommendation

Our work needs to continue because the number of dual call couples is so vast and continues to grow at a rapid pace. We have begun the work of telling the stories of dual call couples and delving into the statistics but there is more to learn and tell. And we have only just begun the work needed concerning priest/bishop couples.

Endnotes

[1] Does not include TEC clerics married to a clergy-person in another tradition.
[2] Specifically, the mean salary for all TEC female clerics is $60,342, and the mean salary for TEC male clerics is $78,121.
[3] For the population, the figures are also 63% and 24%, respectively, for females.
[4] For the population, the figures are 74% and 13%, respectively, for males.

TASK FORCE TO STUDY PROVINCES

Members

Ms. Ellen W. Bruckner, *Chair*	Iowa, VI	2018
Mrs. Angela M. Daniel, *Vice-Chair*	Upper South Carolina, IV	2018
The Rev. Deacon Nancy Crawford, *Secretary*	Oregon, VIII	2018
The Rt. Rev. Mariann Budde	Washington, D.C., III	2018
Mr. Richard Jerry Carroll, Jr.	Albany, NY II	2018
Ms. Bonnie Chambers	Central Pennsylvania, III	2018
The Rt. Rev. Michael J. Hanley	Oregon, VIII	2018
Mr. Thomas W. Peters	Connecticut, I	2018
The Rt. Rev. David M. Reed	West Texas, VII	2018
The Rev. Bayani Rico	Northern California, VIII	2018
The Rev. Consuelo Sanchez	Honduras, IX	2018
Mr. Timothy Skimina	Northern Indiana, V	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

Note: Each province was represented on this Task Force

Mandate

General Convention 2015 Resolution "D011 Eliminate Provinces" enabled this Task Force and charged it with the task of studying the potential effects of eliminating the provinces. The enabling resolution also asked the Task Force to consider what structures might replace the provinces that would facilitate the support of the ministry and mission of The Episcopal Church. The Task Force was asked to consider geographical diversity, connections, constitution and overall costs in their work.

Summary of Work

MEETINGS

The Episcopal Church budget allowed for the Task Force to meet face-to-face:

November 18-21, 2015; October 5-7, 2016; March 30 – April 1, 2017

The Task Force used web conferencing for two (2) meetings and conference calls for subcommittee work. Material was shared via the Extranet.

THE WORK

The Task Force immediately recognized the necessity of gathering information that would provide a current picture of the provincial system and structure. To this end, a survey was created and distributed to individuals who interact with the provincial system, including some in positions of leadership in dioceses, General Convention deputies, and some in known networks. A total of five hundred and forty (540) responses to this survey were received. Multiple choice answers with percentages as well as comments to various survey questions were collated.

Task Force members interviewed people in their provinces for perceptions concerning the provincial system in that province. Those interviewed included delegates to provincial synods, diocesan leadership, network participants, staff of The Episcopal Church and dioceses and provincial coordinators. Task Force members contacted other groups and networks who use the provincial system for anecdotal information. During two (2) of their annual meetings, The Provincial Leadership Conference [PLC] (consisting of Presidents, Vice-Presidents and Coordinators of each province) discussed questions from the Task Force. The author of the enabling resolution was contacted in order to explore the intent of the resolution. The Task Force received a written document from the bishops in Province VII with input/suggestions concerning the provincial system.

Another important piece of information is a report from the Archives of The Episcopal Church summarizing the resolutions and legislation pertaining to provinces since the topic of provinces first emerged in 1850. The summary includes the following statement:

> "Over the past five (5) decades, the Structure Commission has engaged in an iterative process of organizational review of the provincial system. Issues examined by the Commission include the size, makeup, and functions of both Houses of General Convention, the number of commissions and committees, the functions of the offices and the regional jurisdictions of the Church. These issues were addressed repeatedly and from many different perspectives. In each instance the goals of strengthening communication and encouraging partnerships have been emphasized for the good of Church wide mission.
>
> The General Convention has concluded that the provincial system, while lacking a robust sense of mission and organizational function, fills a relational role for the Church that cannot be easily replaced without re-thinking the usefulness of traditional geographic regionalism. The Church has been reluctant to explore alternative models, although coalitions of interested dioceses have successfully launched sustained efforts in such areas as social justice, ministry and evangelism."

The report continues with more detailed explanation of the discussions concerning provinces throughout the history of General Conventions.

The Task Force generalized from the survey and other information in order to provide the information and recommendations shared in this report. It is understood that data needs to be interpreted and therefore answers can be considered subjective. The Task Force made every effort to remain objective, however, personal perspectives have a tendency to influence the way each person "sees" the data. As the recommendations that follow emerged, the Task Force checked to ensure the recommendations were informed and supported by the data as much as possible. The Task Force also referred to the enabling resolution to ensure the resolution was being honored.

It should be noted that the members of the Task Force are not of a like mind in their understanding of or expectations of provinces. While members all have experience with the provincial system, the experiences supported a wide variety of perceptions. Conversations leading to the recommendations opened these perspectives and allowed opportunities to explore in more depth the understandings and questions concerning the provincial system and its role in the broader system of The Episcopal Church.

Because of the diversity in perceptions and beliefs about provinces, the Task Force identified their guiding principles:

- The goal of any part of the structure is to promote the mission of the Church;

- The Constitution and Canons must be as flexible as possible;

- Provinces have varying capacity to respond to requests and mandates;

- The role of provinces in polity should be minimized and their role in mission should be maximized;

- Demographics and capacity of each province will guide the ability to respond;

- The structure should be a vehicle for mission;

- Provinces serve the networks/collaborations;

- Appreciating diversity is a core value; recognizing each province will be unique in its gifts, skills and fruitfulness;

- Geographical diversity exists.

THE SURVEY

The survey consisted of ten (10) multiple choice questions dealing with effectiveness of communication and relationship between province and member dioceses. There were four (4) short answer questions dealing with potential effects of eliminating provinces. There was one (1) question about non-contiguous dioceses directed to Provinces II, VIII, and IX. Using the numerical data, the Task Force summarized the first ten (10) multiple choice questions based on percentages. The four (4) short answer questions were summarized anecdotally from the large number of written responses.

To receive five hundred and forty (540) responses to a survey seemed remarkable to the Task Force. It possibly represents the interest in the work of the provinces and/or the commitment to the work of The Episcopal Church. The Task Force is grateful for the many thoughts and for the diversity of opinions expressed.

The Task Force has summarized the multiple choice answers, questions 1-10, as follows:

- Respondents feel provinces are functional as they are currently constructed. 77.5% responded "Highly functional" or "functional";

- Communication is best between province and its dioceses with only 28% saying "weak" and 16% saying "I don't know";

- Communication is worst between province and the church wide level of the structure as well as weak between provinces;

- On the question about provinces enhancing the ministry of the dioceses, 57% said "yes (24%)" or "somewhat (33%), 43% said "no" or "don't know";

- The financial aspects of provinces do not seem to be a particular concern;

- There is no clear sense of the origins of negativity toward the provinces;

- Most felt the role of supporting dioceses is the most important role of provinces.

The short answer questions are more subjective.

Question 11: What would be missed if the province was disbanded?

In summary; the presence of a pre-existing structure for collaboration facilitates preparation for General Convention deputies, networking beyond one's own diocese, and it enables small ministries to find individuals and resources to carry out their role in God's mission. To remove this structure would jeopardize these advantages.

Question 12: How would a dissolution of provinces affect your networks?

There were four hundred and twenty-nine (429) responses out of a possible five hundred and forty (540). Many responses were short – "I don't know", "not at all". About 37% or one hundred and sixty-two (162) people were in the "no effect at all" category. We interpreted this to mean most people felt the networks functioned irrespective of the province and that networks would continue without the province, or there is no network action in the province to be affected. Some answers included a self-reference to not knowing much about the provinces or networks. The lack of focus on any one idea or effect may lead to the idea there is little distinct reason or knowledge about province and networks, only assumptions. The voices who spoke passionately about the effect came from those who have had an amount of experience with the provinces, so it was clear that for some networks, the effect of eliminating provinces would mean extensive shifts in the network's organization especially in the area of representation to the network. Some responses mentioned a sense of isolation and loss of a central identity.

Question 13: What roles might provinces play that they are not currently playing?"

> There were three hundred and forty (340) (62.9%) responses. About half of the responses mentioned the coordination of resources and sharing ministries between dioceses. Increased networking and carrying out The Episcopal Church initiative were included in this area. The other half of the responses was clustered around "I don't know" type answers.

Question 14: If the provincial structure did not exist what do you see as the three (3) worst consequences?

> Clearly respondents felt the "sense of isolation" would increase and communication would decrease. Networking would be lost or more difficult with no organizational structure. Thirty-nine (39) of three hundred and seventy-three (373) responses said, "no consequences". Also mentioned was the loss of identity, loss of paid staff, miss getting together and a granting mechanism.

RESOLUTIONS AND RECOMMENDATIONS

The Task Force submits its work as resolutions and recommendations for deliberation. These resolutions and recommendations are based on our research and the guiding principles established for our work.

The provinces are only one part of the complex system called The Episcopal Church, which is itself only one part of the wider Anglican Communion. The enabling Resolution 2015-D011, asked for a Task Force to look at the effects of eliminating the provinces, only one part of this complex system. It also asked for suggestions as to what might be put in place if provinces were to be eliminated. Recognizing the complexity of systems means realizing that changing one part of the system will often affect other parts of the system in unintended and/or unrecognizable ways. Drawing on the brief historical report from the Archives as well as systems and complexity theory, it may be said that the pattern of having some type of structure connecting the diocesan level with the church wide level is important. The pattern suggests that if this current iteration of a "provincial system" was eliminated some other structure would emerge to try to stabilize the disorder caused by the elimination of the current provincial system. Rather than invent something new, the recommendation is to look at what already exists and maximize what is working, as well as shifting what may not be working in each of the provinces. The energy in the system needs to support the mission of the Church, not be used in maintaining the structure. There is a structure in place which functions, with varying degrees of effectiveness, and this existing structure can be used to continue to build those areas that support the mission of the Church. Again, the passionate responses from the survey indicated that the existence of a "provincial" structure is important. Even though there were voices who did not know anything or had limited information, these voices are only a part of the answers and we should use caution if we assume that if the system is not well known it does not need to exist.

In particular, at this time, attention needs to be given to strengthening the networking opportunities. In this time of discernment (see resolution below), provinces will be able to determine how best to

use their function of connectors and communicators. Recognizing the existence of coordinators whose purpose is to be that connector in the province offers the province the ability to expand the networking experiences to include not only those networks already formed, but to discern those ministry/mission issues that may be emerging and in need of an intentional nurturing in order to grow. There may be an assumption that networks will function on their own given the technologies allowing expanded communications that exist today. While technology today certainly enhances the connection opportunities for some, it also may limit many from being part of a network due to geographical inconsistencies and other barriers that prevent wide spread access to all the technology. The provinces are in a position to prophetically keep the Church aware of the mission and ministry needs throughout the whole Church providing a picture and map that will guide the whole Church in its wide response to the culture. This opportunity may be missed because of the assumption that networks will automatically happen. The intentionality required for this wide spread communication and connecting will most likely take the form of someone being responsible for network organization. Each province needs to explore the idea of funding for this connecting and communicating work. For several years this work has been the responsibility of the provincial coordinator/executive director and was completed with varying degrees of effectiveness. The Episcopal Church tried to establish regional staff offices throughout The Episcopal Church and while this format was not long lived, it did indicate the desire on the part of the Church wide level to have some sort of "regional" coordinator/communicator. For close to fifteen (15) years, the provincial coordinators have been providing this kind of connecting and communicating across the Church. The coordinators worked among themselves in order to build capacity for this connecting and communicating and to provide the support for the prophetic, grassroots networking. It seems wise to delve more deeply into this part of the organization already in place in order to nurture growth in this part of the system.

Until The Episcopal Church is able to undertake a thorough review of the whole system, the recommendation will be to leave the provincial structure in place and to focus on how the provincial system can be supported and encouraged to be the best it can be in fulfilling its role in the larger system of The Episcopal Church.

FURTHER RECOMMENDATIONS

The Task Force encourages those entities, already using the Provincial system to support its ministry and mission, to continue to use the Provincial system as well as seek ways to enhance their work and share ideas and resources throughout the Provincial system.

The Task Force has tried to approach all the work with a positive viewpoint, coming from an attitude of abundance rather than scarcity. All parts of the Church are encouraged to seek what is positive and how the positive aspects can be supported and encouraged rather than focusing on the perceived inadequacies of one part of the system.

Geographical boundaries do not have to inhibit mission. Dioceses, congregations and individuals should seek others who share their passions and work together on that passion. The main role of provinces is to connect and communicate with those people sharing like passions.

Provinces must work on their funding issues. While the numbers on the survey indicate that many do not recognize that funding is an issue at this time; if the Church is prepared to strengthen all parts of the system, funding issues may become more pronounced. This is a collaborative effort involving the member dioceses as well as The Episcopal Church at the Church wide level. As we move toward a more collaborative system, it is too limiting to treat a complex issue such as financial resources in an either/or manner meaning either the dioceses support the provinces or The Episcopal Church supports the provinces. The Task Force encourages the continual dialogue concerning how the Church resources its mission. If the Church is going to be strong, all parts of the system need to be strong; therefore, one part cannot say to another part that they are not important.

The Task Force is recommending that the current process of selecting a nominating committee for the election of a Presiding Bishop be changed so that provinces do not figure into the process as they currently do. This will necessitate a change in Title I Canon 2 Of the Presiding Bishop. The Task Force on Provinces has collaborated with the Task Force on Review of Presiding Bishop Election and Transition Process.

The Task Force recommends that the Presiding Bishop be free to choose his/her own Council of Advice and not be bound by current Rules of the House of Bishops Article 27.

Proposed Resolutions

RESOLUTION A071: PROVINCIAL VITALITY

Resolved, The House of _____ concurring, that the Provincial Leadership Conference articulate characteristics that would indicate a vital, fruitful provincial system contributing to strengthening the mission of The Episcopal Church and the wider Church. The indicators must take into account the diversity inherent in the provinces and those dioceses they serve, and they must be applicable across The Episcopal Church; and be it further;

Resolved, That the Provincial Leadership Conference report annually to the Executive Council on the progress of this work; and be it further;

Resolved, That each province determine its ways of moving toward vitality based on the articulated indicators, reflecting regularly on the outcomes of any changes/shifts and reporting outcomes to the annual Provincial Leadership Conference gathering.

Explanation

The goal of this resolution is for each province to become the best it can be. The Provincial Leadership Conference is constituted to do the oversight of this work each province must undertake. It also holds the space for accountability of each province.

RESOLUTION A072: PROVINCIAL GEOGRAPHICAL BOUNDARIES

Resolved, The House of _____ concurring, that in the 2018-2021 triennium, dioceses review, consider and align with whichever province best serves their identity and needs, as the Constitution and Canons allow.

Explanation:

Over the years, there are dioceses that identify more readily with a province other than the one in which they geographically find themselves. The Task Force on Provinces recognizes that it may be important as The Episcopal Church commits to reviewing the provincial system, that each diocese review and commit to a particular province. The Constitution and Canons both comment on the option dioceses have of shifting to a different province.

> ARTICLE VII
> Dioceses may be united into Provinces in such manner, under such conditions, and with such powers, as shall be provided by Canon of the General Convention; provided, however, that no Diocese shall be included in a Province without its own consent.

> Title I Canon 9 Sec.3 (b)
> By mutual agreement between the Synods of two (2) adjoining Provinces, a Diocese or Area Mission may transfer itself from one of such Provinces to the other, such transfer to be considered complete upon approval thereof by the General Convention. Following such approval, Canon I.9.1 shall be appropriately amended.

RESOLUTION A073: MANDATES TO PROVINCES

Resolved, The House of _____ concurring, that prior to enacting legislative actions involving provinces, governing bodies, including General Convention and Executive Council, review the action in order to determine if all provinces have the capacity to enact these actions and make adjustments in the legislation to allow for diversity in responses.

Explanation:

Recognizing that provinces vary, sometimes widely, in their capacity to respond to requests/actions given in a general statement or mandate for the whole church, it is important that those requests/mandates be carefully reviewed prior to their issuance in order to ensure success. The province being asked needs to have the ability to respond and if it does not, it will ensure failure. Each province may have the intent of carrying out the requests, but may not have the capacity to do so which leads to frustration for both the province and the body issuing the request. There are a variety of factors determining capacity in each province such as population, financial resources, geographical issues and organizational structures.

RESOLUTION A074: THE PROPHETIC VOICE OF PROVINCES

Resolved, The House of _____ concurring, that in the 2018-2021 triennium, each province exercise its prophetic vision and voice for The Episcopal Church, in calling forth and nourishing the ministry and mission networks throughout the province; and be it further

Resolved, That the Provincial Leadership Conference help to build the collaborations across the provincial boundaries, and with the ministry offices at The Episcopal Church noting particularly the resources used and additional resources that would benefit the networks, submit this data to Executive Council at the end of each budget year.

Explanation:

The provincial work of connecting and communicating is best exemplified by the functioning of networks – those mission and ministry groups that seek to respond to God's call in their places. The prophetic work of provinces is to support those functioning networks in keeping God's dream in front of the people and just as importantly to call networks into being when the need for the network begins to emerge. The province, due to its broader view, is in a unique position to detect the emerging areas that need response from the Church. By nurturing the relationship with both the member dioceses and The Episcopal Church, provinces are able to voice concerns and responses.

RESOLUTION A075: EXECUTIVE COUNCIL REPRESENTATIVES FROM PROVINCES

Resolved, The House of _____ concurring that the Standing Commission on Nominations develop a process for ensuring diverse representation on Executive Council including qualified persons from all the provinces in The Episcopal Church; and be it further

Resolved, That the election of these qualified people be held at General Convention rather than as part of provincial elections.

Explanation:

The Task Force on Provinces is recommending that the provinces focus their energy on the mission of the Church and relax their focus on the polity of The Episcopal Church. Because of advances in communication, it is easier for the whole church to review qualifications of people willing to serve on Executive Council and who have the skills needed at any particular time. The focus will necessitate determining the skills and abilities needed for a particular time and then seeking people who have those skills and abilities. There is an element of trust being placed in the Standing Commission on Nominations to strive to search for people who relate to all parts of our Church. With their energy devoted to the mission of the Church and to communication and coordination, the provinces will be able more and more to strengthen their part of the whole system.

RESOLUTION A076: AMEND CANON I.1.14(C)

Resolved, The House of _____ concurring, that Canon I.1.14 (c) of the Canons is hereby amended to read as follows:

(c) From the sites approved by the General Convention, the Joint Committee, with the advice and consent of a majority vote of the following: The Presidents and the Vice-Presidents of both Houses of Convention, ~~the Presidents of the Provinces~~ and the Executive Council, shall determine the site for such General Convention and proceed to make all reasonable and necessary arrangements and commitments for that meeting of the General Convention. The site and date thus selected shall be deemed to have been appointed by the General Convention, as provided in the Constitution.

Explanation:

The Task Force on Provinces is recommending that provinces focus on the mission of the Church and remove themselves from all the canonical responsibilities that may be necessary for the organization but that don't apply to furthering the mission of the Church. The task of approving the site of General Convention does not seem to relate to the mission of the Church.

RESOLUTION A077: AMEND CANON I.7.1 (A)

Resolved, The House of _____ concurring, that Canon I.7.1 (a) of the Canons is hereby amended to read as follows:

Sec. 1. In every Province, Diocese, Parish, Mission and Institution connected with this Church, the following standard business methods shall be observed:

(a) All accounts of Provinces shall be audited annually by an independent certified public accountant, or independent licensed accountant, or such audit committee as shall be authorized by the ~~Provincial Council~~ *Province*. The Audit Report shall be filed with the Provincial ~~Council~~ *Leadership and the Executive Council* not later than September 1 of each year, covering the preceding calendar year.

Explanation:
Recognizing that Provinces may differ in the names of their governing body, the language is being changed to allow the flexibility in language.   The Executive Council has been included in the notification.

RESOLUTION A078: AMEND CANON I.9.2-13

Resolved, The House of _____ concurring, that Canon I.9.2 of the Canons is hereby amended to read as follows

Sec 2. The primary purposes of the Provinces are to facilitate inter-diocesan collaboration *to further the mission of the Church and* achieve Diocesan and Episcopal Church goals, and to enable more effective communications and regional advocacy of significant programmatic efforts.   *General Convention may not mandate work to be completed by the Provinces. However, Provinces may choose to work collaboratively on General convention resolutions*; and be it further

Resolved, That Canon I.9.3 (a) is hereby amended to read as follows:
Sec. 3 (a) When a new Diocese or Area Mission shall be created wholly within any Province, such new Diocese or Area Mission shall be included in such Province. In case a new Diocese or Area Mission shall embrace territory in two (2) or more Provinces, it shall be included in ~~and form part of the Province wherein the greater number of Presbyters and Deacons in such new Diocese or Area Mission shall, at the time of its creation, be canonically resident.~~ t*he Province of its choice as allowed by the Constitution and Canons.* Whenever a new Diocese or Area Mission shall be formed of territory not before included in any Province, the General Convention shall designate the Province to which it shall be annexed*;* and be it further

Resolved, That Canon I.9.3 (b) is hereby amended to read as follows:
(b) By mutual agreement between the ~~Synods of~~ two (2) adjoining Provinces, a Diocese or Area Mission may transfer itself from one of such Provinces to the other, such transfer to be considered

complete upon approval thereof by the General Convention. Following such approval, Canon I.9.1 shall be appropriately amended; and be it further

Resolved, That Canon I.9.4 is hereby amended to read as follows:

Sec. 4. For the purpose of the Province the ~~Synodical~~ rights and privileges of the several Dioceses within the Province shall be such as from time to time shall be determined by the ~~Synod~~ governing *documents and Leadership* of the Province; and be it further

Resolved, That Canon I.9.5 is hereby amended to read as follows:
Sec. 5. ~~There shall be in each Province a Synod consisting of a House of Bishops and a House of Deputies, which Houses shall sit and deliberate either separately or together. The Synod shall meet on a regular basis as determined by each Province for the purpose of organizing and carrying out the responsibilities of the Province as provided in the Canons.~~ *Provinces must choose a President, who can be of any order, and they shall otherwise organize themselves as they see fit, with by-laws subject to approval by Executive Council. The Executive Council is responsible for ensuring that the by-laws serve the interests of both clerics and laity;* and be it further

Resolved, That Canon I.9.6 is hereby amended to read as follows:
Sec. 6. ~~Every Bishop Diocesan of this Church, having jurisdiction within the Province, every Bishop Coadjutor, Bishop Suffragan, and Assistant Bishop, and every Bishop whose episcopal work has been within the Province, but who by reason of advanced age or bodily infirmity has resigned, shall have a seat and vote in the House of Bishops of the Province.~~ *Each Diocese and Area Mission within the Province shall be entitled to representation in the Province by Bishops, Presbyters or Deacons canonically resident in the Diocese or Area Mission, and Lay Persons, confirmed adult communicants in good standing of a Church in this province, but not necessarily domiciled in the Diocese or Area Mission, in such number as the Province may provide. Each Diocese and Area Mission shall determine the manner in which its members shall be elected;* and be it further

Resolved, That Canon I.9.7 is hereby amended to read as follows:
Sec. 7 ~~(a) The President of each Province may be one of the Bishops, Presbyters, Deacons, or Lay Persons of the Province, elected by the Synod. The method of election and term of office shall be determined by the rules of the Synod.~~
~~(b)When the person elected is not a Bishop, a Vice-President shall be elected who shall be a Bishop member of the Province. In this event the Bishop so elected shall serve, ex officio, as President of the House of Bishops of the Synod, and shall represent the Province in all matters requiring the participation of a Bishop.~~ *The Province shall have power: (a) to enact Ordinances for its own regulation and government; (b) to deal with all matters within the Province; provided, however, that no Province shall have power to regulate or control the internal policy or affairs of any constituent Diocese; and provided, further, that all actions and proceedings of the Province shall be subject to and in conformity*

with the provisions of the Constitution and the Canons for the government of this Church; (c) to adopt a budget for the maintenance of any Provincial work undertaken by the Province, such budget to be raised in such manner as the Province may determine; and be it further

Resolved, That Canon I.9.8 is hereby amended to read as follows:
Sec. 8. ~~Each Diocese and Area Mission within the Province shall be entitled to representation in the Provincial House of Deputies by Presbyters or Deacons canonically resident in the Diocese or Area Mission, and Lay Persons, confirmed adult communicants of this Church in good standing but not necessarily domiciled in the Diocese or Area Mission, in such number as the Provincial Synod, by Ordinance, may provide. Each Diocese and Area Mission shall determine the manner in which its Deputies shall be elected.~~ *The Provinces shall work with the Leadership of The Episcopal Church to nominate individuals to serve the mission needs of the wider church;* and be it further

Resolved, That Canon I.9.9 is hereby amended to read as follows
Sec. 9. ~~The Provincial Synod shall have power: (a) to enact Ordinances for its own regulation and government; (b) to perform such duties as many be committed to it by the General Convention; (c) to deal with all matters within the Province; provided, however, that no Provincial Synod shall have power to regulate or control the internal policy or affairs of any constituent Diocese; and provided, further, that all actions and proceedings of the Synod shall be subject to and in conformity with the provisions of the Constitution and the Canons for the government of this Church; (d) to adopt a budget for the maintenance of any Provincial work undertaken by the Synod, such budget to be raised in such manner as the Synod may determine; (e) to create by Ordinance a provincial Council with power to administer and carry on such work as may be committed to it by the General Convention, or by the Presiding Bishop and the Executive Council, or by the Synod of the Province.~~ *Each Province shall keep minutes, journals or other records of its meetings, and shall transmit one (1) copy of the records to the Secretary of the House of Deputies, and one (1) copy to The Archives of The Episcopal Church. The Province shall also transmit copies of any unpublished inactive records to the Archives. The President of each Province shall annually submit to the Executive Council a written report on the ministries, programs and other work of the Province, including a description of how funds (if any) appropriated by the General Convention have been used, and shall report on their work to the Executive Council, on the date and in the form specified by the Executive Council;* and be it further

Resolved, That Canon I.9.10 is hereby amended as follows:
Sec. 10. ~~The Synod of a Province may take over from the Executive Council, with its consent, and during its pleasure, the administration of any given work within the Province. If the Province shall provide the funds for such work, the constituent Dioceses then members of,~~
~~and supporting, such Province shall receive proportional credit therefor upon the quotas assigned to them for the support of the Program of the Church, provided that the total amount of such credits shall not exceed the sum appropriated in the budget of the Executive Council for the maintenance of the work so taken over.~~ *;* and be it further

Resolved, That Canon I.9.11 is hereby amended as follows:

~~Sec. 11. Within sixty days after each session of the General Convention, the Presidents of the two Houses thereof shall refer to the Provincial Synods, or any of them, such subjects as the General Convention may direct, or as they may deem advisable, for consideration thereof by the Synods, and it shall be the duty of such Synods to consider the subject or subjects so referred to them at the first meeting of the Synod held after the adjournment of the General Convention, and to report their action and judgment in the matter to the Secretary of the House of Bishops and to the Secretary of the House of Deputies at least six months before the date of the meeting of the next General Convention.~~ ; and be it further

Resolved, That Canon I.9.12 is hereby amended as follows:

~~Sec. 12. 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 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 Canon I.9.13 is hereby amended as follows:

~~Sec. 13. The President of each Province shall annually submit to the Executive Council a written report on the ministries, programs and other work of the Province, including a description of how funds appropriated by the General Convention have been used, and shall report on their work to the Executive Council, on the date and in the form specified by the Executive Council~~

Explanation:

The Task Force on Provinces recommends the simplification of the Canons regarding Provinces based on the guiding principles the Task Force established for its work. The Task Force sought to focus the work of the Province on supporting the mission of the Church rather than on maintaining parts of the system focused only on the organization of the system itself. Energy given to maintaining a system is energy taken from supporting the mission or work of the system. The language also enables provinces to organize themselves as they determine is best for their needs, geography and resources. In keeping with the sense of diversity apparent in the provinces at this time, it is not helpful to bind them to a system of "synods" with the assumption that each province is identical to the others. Hopefully, these changes create a more flexible system, able to respond as able to the mission needs of the Church.

RESOLUTION A079: AMEND CANON I.11.3 (C)

Resolved, The House of _____ concurring, that Canon I.11.3 (c) is hereby amended to read as follows:

(c) In every Missionary Diocese there shall be an annual Convention, composed of the Bishop or Bishops, the other Clergy of the Diocese, and Lay Delegates from the organized Congregations. Such Convention shall elect a Standing Committee, in accordance with the diocesan Canons, which shall have the powers and duties set forth for Standing Committees in Canon I.12 and in other Canons of the General Convention. It shall also elect Clerical and Lay Deputies and alternate Deputies to the General Convention, in accordance with its diocesan Canons, and the provisions of Article I.4 of the Constitution. If the Missionary Diocese is a member of a Province of this Church, it shall also provide for ~~Clerical and Lay Deputies and alternate Deputies to the Synod,~~ *representation in the Province* in accordance with the diocesan Canons and the provisions of the Ordinances of the Province.

Explanation:

The changes represent bringing language into consistency with other proposed changes.

RESOLUTION A080: A SEASON OF PROVINCIAL DISCERNMENT

Resolved, The House of _____ concurring, that during the 2018-2021 triennium, The Episcopal Church commit to a season of discernment focused on identifying and strengthening the work of the provinces in the whole system of The Episcopal Church; including but not limited to: visioning for the kinds of collective aspirations for dioceses within a province as well as between provinces and articulating how these aspirations and efforts support the mission of The Episcopal Church and the wider Church; building the capacity for resource sharing between dioceses within a province as well as across the provinces; articulating the funding issues associated with the collaborative communications and networking and finding ways to support these funding issues (including the use of compensated staff); and be it further;

Resolved, This work be initiated by the provinces, but expanded to include the dioceses and the larger Episcopal Church offices in the work and deliberations; and be it further;

Resolved, The information articulated and developed be collected by the Provincial Leadership Conference and presented with recommendations for any system changes to the 80th General Convention.

Explanation:

From the research of the Task Force on Provinces, it has become clearer that possibilities for collaboration and communication through the provincial system are being missed. There is a need to make sure all parts of a large, complex system are functioning to their potential in order for the entire

system to function optimally. The provincial system is only one part of the larger system of The Episcopal Church and finding the ways to strengthen one part of the system will impact the rest of the system. It is difficult to determine the effects prior to actual changes. It will be necessary to collate all the changes and then to identify how the larger system is affected. The Provincial Leadership Conference is constituted to be able to do this work. Hopefully by committing to an intentional effort of strengthening the provinces for the triennium, opportunities for the entire system will emerge.

TASK FORCE TO UPDATE SEXUAL MISCONDUCT POLICIES

Membership

Ms. Robin Hammeal-Urban, *Chair*	Connecticut, I	2018
The Rev. Canon Carol Cole Flanagan, *Vice-Chair*	Washington, D.C., III	2018
The Rev. Canon Julia McCray-Goldsmith, *Secretary*	California, VIII	2018
Ms. Judith Andrews	Olympia, VIII	2018
Ms. Cookie Cantwell	East Carolina, IV	2018
Mr. Eric Travis	Michigan, V	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

Mandate

This Task Force is charged with fulfilling the mandates of two (2) General Convention [GC] resolutions -- one (1) to update safe church policies, and the other to update safe church training materials. Both resolutions require updated policies and materials to reflect the experience of The Episcopal Church [TEC] in using the 2004 Model Policies and Safeguarding training materials, and to cover topics such as social media, mission trips, pilgrimages, camp and conference center programs, and other overnight events, as well as experiences of LGBTQ persons.

While the focus of Resolution 2015-A073 is limited to children and youth (Update Model Policies for Protection of Children and Youth), the scope of Resolution 2015-A074 (Update the Safeguarding Materials) is broader, encompassing both vulnerable adults, and children and youth. The "Safeguarding Materials" referenced in Resolution 2015-A074 include both *Safeguarding God's People* and *Safeguarding God's Children.* Given that effective updated training must reflect updated policies, the Task Force first needed to update policies for the protection of vulnerable adults, and children and youth, before envisioning effective updated training materials.

The fourth resolve in Resolution 2015-A073 requires that the updated model policies "be promulgated after they are approved by the Special Task Group," thereby granting the Task Force authority and responsibility to approve the updated model policies and promulgate them across TEC.

No funds were budgeted in this triennium to update training materials.

Summary of Work

MEETINGS

As of this writing, the Task Force has met regularly for over two (2) years; beginning in November of 2015. At the invitation of the GCO, the Task Force convened five (5) in-person meetings: 11/18-21/2015 in Baltimore, MD; 5/2-4/2016 in Nashville, TN; 11/5-8/2016 in Chicago, IL; 3/27-30/17 in Baltimore, MD; and 9/27-30/2017 in Renton, WA. The bulk of these in-person meetings were dedicated to reviewing precedents and responses to surveys, consulting experts, designing updated training and drafting Updated Model Policies.

In addition to the five (5) in-person meetings, the Task Force met regularly by telephone, primarily to set goals for our work between in-person meetings and to assess progress. To date, the Task Force has had eighteen (18) phone meetings: 4/4/16, 7/28/16, 12/8/16, 1/10/17, 2/9/17, 3/9/17, 4/17/17, 5/8/17, 6/5/17, 7/6/17, 8/3/17, 8/17/17, 9/7/17, 10/12/17, 11/9/17, 11/16/17, 11/28/17 and 11/30/17. In order to complete our mandate, we anticipate additional phone meetings, four (4) of which are scheduled for 12/7/17, 12/15/17, 1/11/18 and 2/15/18. Ms. Bronwyn Clark Skov participated in many of these meetings as the Domestic and Foreign Missionary Society [DFMS] staff liaison to the Task Force.

PROCESS TO UPDATE MODEL POLICIES

Before beginning substantive work, the Task Force resolved to ground all model polices and training materials in theology and our Baptismal Covenant, which calls all baptized members of TEC to the highest standards of behavior when interacting with vulnerable populations. In addition, the Task Force committed to providing model polices that are accessible to anyone on a parish, diocesan or provincial level by providing sufficient detail and guidance to enable anyone to fully embrace and adhere to the standards set forth.

The Task Force analyzed the 2004 Model Policies for the Protection of Children and Youth from Abuse as published by the Church Pension Group [CPG], conducted an informal review of policies in a number of dioceses and explored the challenges to compliance with the 2004 policies. In addition, the Task Force reviewed the Model Policy for the Prevention of Sexual Exploitation of Adults, also published by CPG.

The Task Force's initial draft of updated model policies was informed by the experience of Task Force members, and the formal and informal networks with which they interact. The Task Force took into account not only the need to address social media, mission trips, pilgrimages, camp and conference center programs, other overnight events and the experiences of LGBTQ persons (as delineated in the resolutions), but also the challenges presented by the diversity of contexts in which such policies will be implemented in TEC; resourced parishes and dioceses and those with fewer financial and human

resources, as well as those with a history of complying with all safe church policies and training and those without such history and experience.

The Task Force created two (2) initial, draft model policies-- one (1) for the protection of children and youth, and two (2) for the protection of vulnerable adults. In May 2017, through the GCO, these draft model polices were circulated to over fifty (50) individuals and networks across TEC for review and comment. Reviewers included bishops, diocesan staff members responsible for or experienced with safe church related matters, paid and unpaid parish staff responsible for implementing safe church policies, subject matter experts on aging, those engaged in Hispanic ministry and those engaged in LGBTQ+ advocacy.

All comments submitted by reviewers were analyzed by the Task Force. Some reviewers were interviewed to better understand and appreciate their unique perspectives. All comments submitted were considered by the Task Force in the final revision of the approved Model Policies.

The Model Policies attached to this report as Supplementary Materials were approved by the Task Force on November 28, 2017. Pursuant to these Model Policies, each diocese is to adopt policies in accordance with these Model Policies by January 1, 2019.

CONTENT OF UPDATED MODEL POLICIES

Both updated Model Policies (for the Protection of Children and Youth, and for the Protection of Vulnerable Adults) are grounded in theology and our Baptismal Covenant. Our care for all of God's creation is built upon this foundation. Therefore, the Updated Model Polices begin with a theological statement.

Recognizing that dioceses and parishes have familiarity and experience with the 2004 Model Polices as promulgated by CPG, the Task Force sought to retain the major components of those policies, namely, definitions, application and screening, education and training, monitoring and supervision, and responding to concerns.   The segments of the Update Model Polices include:

I.   Theological and Ethical Foundations

II.   Expectation and Local Implementation

III.   Definitions

IV.   Application and Screening

V.   Education and Training

VI.   Monitoring and Supervision

VII.   Responding to Concerns

VIII. Policy Adoption, Implementation, and Audit

Appendix A — Screening and Training Protocols (a chart that clearly delineates the level of screening and type of training required to participate in specific ministry functions).

Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications for Children and Youth OR Vulnerable Adults

Both Model Policies (one for ministry with Children and Youth, the other for ministry with Vulnerable Adults) are constructed to be as similar to each other as possible; the structure is identical, as are many of the provisions. This will facilitate learning and familiarity with standards set out in the Model Policies. Provisions vary in each Model Policy only as necessary to address specific needs of each vulnerable population.

The Model Policies include provisions for mission trips, pilgrimages, camp and conference center programs, and other overnight events. They include definitions that reflect our current understanding of gender identity and sexuality, including Cisgender, Gender Non-binary, LGBTQ+ and Transgender, as well as provisions to enhance the understanding, welcoming and safety of all gender identities and expressions.

The Model Policies also set out a new vision for safe church training as reflected in the chart in Appendix A — Screening and Training Protocols, and as described below.

VISION & DESIGN TO UPDATE SAFE CHURCH TRAINING

The Updated Model Policies reflect a new vision for safe church training that fosters a culture of safety and inclusion for all people and includes specialized training tailored to ministry roles and functions. Accordingly, the Task Force created a plan for written and web-based training materials that includes responsive and multilingual online web-based resources, a modern content management system that will allow various users to easily access the Model Policies as well as training opportunities and resources.

The web-based site will provide *Universal Training* accessible to all congregants and ministry participants that foster a culture of safety and inclusion for all people. This will include a broad overview of issues of vulnerability, power imbalance and healthy boundaries; designed to equip all people to live out their Baptismal Covenant. For those who oversee a ministry or program, or who supervise others engaged in a ministry with a vulnerable population, there will also be easily accessible *Specialized Training* consisting of discrete modules on topics directly related and tailored to each role and ministry function in a congregation or diocese. *Universal Training* and *Specialized Training* are defined in the text of Updated Model Policies and referred to in Screening and Training Protocols, as set out in Appendix A of the Model Policies.

The Task Force envisions the architecture and layout of the safe church training website to automatically guide users through the applicable training modules. By way of illustration, a chaperone

on a youth mission trip need only access the website, identify their role in the upcoming mission trip, and the website will automatically identify and guide them through the modules relevant to that role, omitting modules that are not directly relevant to the specific ministry. In this example, there would be no need for training on how to conduct public records checks, interview applicants or supervise others.

The envisioned website design is similar to that currently being constructed to provide TEC with training on clergy disciplinary processes as set out in Title IV of the Constitution and Canons. This work is overseen by the Standing Commission on Structure, Governance, Constitution and Canons. The Task Force consulted with Polly Getz, *Chair* of the Standing Commission, and Craig Wirth, an employee with the Diocese of Utah who is designing and implementing the web-based product that the Commission is creating for Title IV training materials. Ideally, the safe church training website and the Title IV training website will be linked so the user can seamlessly explore options and responsibilities under Title IV and the Model Policies.

The website should also allow congregations and dioceses to track successful completion of training modules for each individual trainee. Additional support to dioceses and congregations could be provided through this website by including online offerings for forum discussions and/or private messaging tools with designated persons serving as resources on sexual misconduct issues that can assist church leaders in fostering discussions needed for resolution of issues in their church or diocese.

The Task Force envisions a fine tuned and reoriented safe church training program with each training module reflecting our call to treat all with dignity and respect. It is out of this call that trainees will be equipped to take action when there is reason to suspect abuse, neglect or exploitation or other violation of the Model Policy. The images and texts contained in all training modules will need to be carefully reviewed to ensure they promote respect for the dignity of all vulnerable populations including LGBTQ+ individuals. The content will not be fear based and will be designed so as not to trigger emotional distress or re-victimize trainees who may have been abused in a church or other setting. One outcome of this training based on the Model Polices will be to reduce risk and resulting litigation; even though the training program is not focused on fear of liability and harm.

The Task Force is not recommending a specific provider for training modules or website design and architecture. The Task Force envisions that there may be a number of varied providers for training modules that will be included in the website. It is anticipated that much of the content of the modules can be curated from already existing resources. Some modules will need to be created to reflect the needs and context of TEC at this time. The Task Force could not implement the vision for updated training during this triennium as there was no funds that were budgeted for such work. This is some of the work that will need to be completed during the next triennium.

WORK REMAINING FOR THE NEXT TRIENNIUM

The web-based vehicle will need to be constructed, and training content will need to be curated and/or created in the next triennium. Plans for publicizing and promoting the Model Policies and website need to be drawn up and carried out, and plans for ongoing curation and maintenance of the site will need to be designed. (Ongoing curation will allow materials to reflect the latest research and trends, reducing the likelihood of the need for a significant revision/update of training materials in the future.) In addition, arrangements will need to be made to produce some written training materials as required by GC Resolution 2015-A074.

Resolutions to support this work appear below.

Proposed Resolutions

RESOLUTION A048: ESTABLISH COMMITTEE TO OVERSEE CREATION OF TRAINING MATERIALS

Resolved, the House of _____ concurring, that this 79th General Convention direct the Executive Council to establish a committee of the Council to oversee the creation and implementation of new safe church training materials to be developed during the next triennium to reflect the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults, such committee to be comprised of not more than nine (9) people who reflect the diversity of The Episcopal Church, which should include youth ministers, those working with vulnerable adults, educators for adults, and those experienced in the prevention of sexual abuse; membership should also include at least three (3) persons from the Task Force to Update Sexual Misconduct Policies appointed in 2015; and be it further

Resolved, That such safe church training materials for the prevention of sexual misconduct include written and web-based training materials that include responsive and multilingual online web-based resources, a modern content management system and a curated resource list, such training to provide Universal Training accessible to all congregants and ministry participants that fosters a culture of safety and inclusion for all people and Specialized Training consisting of discrete modules on topics directly related to ministry roles and functions; and be it further

Resolved, That this 79th General Convention 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: A strong training program is essential for the effective implementation of and compliance with the Model Policies. The establishment of a working group of members with related experience and expertise will ensure that the training materials fill this role.

RESOLUTION A049: HOST MODEL POLICIES ON DFMS WEBSITE .

Resolved, the House of _____ concurring, that this 79th General Convention direct the Domestic and Foreign Missionary Society [DFMS] to host on its website the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults for

the prevention of sexual misconduct approved in 2017, the safe church training materials for such prevention including a comprehensive list of resources and to institute a procedure to update the training materials and curate the resources listed; and be it further

Resolved, That this 79th General Convention direct the Office of the General Convention [GCO] to oversee such hosting, updating and curation responsibilities.

Explanation: In order to be used by dioceses, congregations and members of the Church, the Model Policies, safe church training materials, and resources must be readily available and accessible. The website maintained by DFMS is the natural site for the wide access needed for implementation and compliance. In addition, the website, as envisioned, will require curation to keep the training materials and resources up to date and relevant.

RESOLUTION A050: FUNDING FOR SAFE CHURCH TRAINING

Resolved, the House of _____ concurring, that this 79th General Convention of The Episcopal Church commits itself to the financial support of developing and maintaining safe church training materials to reflect the Model Policies for the Protection of Children and Youth, and Model Policies for the Protection of Vulnerable Adults approved in 2017, and the prevention of sexual misconduct, to be developed during the next triennium, to advance clergy wellness and reduce liability, with costs to be shared equally by the Domestic and Foreign Missionary Society [DFMS], and the Church Pension Group [CPG], and requests that the Joint Standing Committee on Program, Budget and Finance provide a budget allocation for half the cost, $245,000 and directs the Church Pension Group [CPG] to provide the matching $245,000 to provide safe church training materials to implement the Model Policies.

Explanation: An updated, easily accessible safe church training program is essential for the effective implementation of and compliance with the Model Policies for the Protection of Children and Youth, and Model Policies for the Protection of Vulnerable Adults as approved in 2017. Such safe church training programs will also support the reduction of liability, enhancement of wellness of clergy and laity, and furtherance of all members' ability to more fully live out their Baptismal Covenant. Safe church training materials will consist of written and web-based training materials that include responsive and multilingual online web-based resources, a modern content management system and a curated resource list. The Model Policies set out Universal Training accessible to all congregants and ministry participants that fosters a culture of safety and inclusion for all people, and Specialized Training consisting of discrete modules on topics directly related to ministry roles and functions.

The Task Force created a detailed report of these anticipated costs which was provided to the Joint Standing Committee on Program, Budget and Finance in April 2017.

RESOLUTION A051: MODIFY PAROCHIAL REPORT

Resolved, the House of _____ concurring, that this 79th General Convention request the Committee on the State of the Church to consider adding the following with respect to parish and congregation *Safe Church Self-Audits* as required by the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults approved in 2017: (1) the total number of parish and congregation Safe Church Self-Audits expected to be submitted to the diocese,

(2) the number of self-audits received by the diocese, (3) the number of outstanding self-audits, and (4) the date when outstanding self-audits are expected to be received.

Explanation: Including the status of parish and congregation safe church self-audits on the diocesan parochial report is the basis for tracking accountably with the Model Policies for the Protection of Children and Youth and Model Policies for the Protection of Vulnerable Adults as approved in 2017. Such accountability will serve to identify those dioceses and locations that would benefit from enhanced support to fully live into the Model Policies.

Supplementary Materials

MODEL POLICY FOR THE PROTECTION OF CHILDREN AND YOUTH

This model policy includes the following segments:

- Theological and Ethical Foundations
- Expectations and Local Implementation
- Definitions
- Application and Screening
- Education and Training
- Monitoring and Supervision
- Responding to Concerns
- Policy Adoption, Implementation, and Audit

- Appendix A — Screening and Training Protocols
- Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications for Children and Youth

Theological and Ethical Foundations

"And the Word became flesh and dwelt among us, full of grace and truth; we have beheld the Word's glory, glory as of the only Child from God."

— John 1:14 (*An Inclusive Language Lectionary*)

God expressed the fullness of humanity in Jesus of Nazareth, whom we worship as the Word made flesh. To be human is to live with God and the whole of creation in the fullness of freedom and the challenge of responsibility. The pattern of Jesus' life, death, and resurrection resonates unreservedly with God's call to perfect freedom and responsibility.

In baptism, God, speaking through the Church, claims us in Christ. We become in Christ the community of God's final purpose: justice and peace, love and plenty for the whole creation. This new community lives in Eucharistic fellowship with God and Creation, as a sign and instrument of God's reconciling purpose in the world.

The Church is called to embody and advance God's mission. Ministry is the vocation of the whole community: laypersons, deacons, priests, and bishops who together represent Christ and the Church in the world.

The obligation to seek and serve Christ in all persons and to respect the dignity of every human being is binding for all the baptized. The authority with which **leaders** — ordained persons and adults who minister with minors **(children** and **youth),** and youth in leadership roles — are entrusted, creates an inherent power imbalance in the **pastoral relationship.** This power imbalance derives from the leadership role and, in the case of clergy, the symbolic authority of an ordained person. Christian leadership is intended to provide occasions for guidance and grace, and its abuse is always and unequivocally wrong.

Ministry involves a necessary tension between a Gospel-based integrity and a Gospel-based intimacy as modeled by the life of Christ. A rigid adherence to a system of rules leads to an unproductive legalism. Yet, without the framework of the law, the intimate relationships into which Christ calls us risks distortion and harm. All the people of God are called to minister attentively within this tension. These model policies are intended to provide a pattern for attentive practice of ministry.

This document is a statement for the Episcopal Church, setting forth expectations for its leaders in their relationships with children and youth. The purpose of these model policies is to foster the highest standards of behavior in ministry settings. The document includes:

a. *Screening and Training Protocols* (Appendix A), which explains the level of screening and training required before engaging in ministry with children and youth;

b. a description of requisite training that is specialized and tailored to ministry role and function;

c. behavioral standards designed to ensure that children and youth and all who engage in ministry with them are treated with dignity and respect in all settings;

d. *Recommended Practices and Guidelines for Social Media and Electronic Communications* (Appendix B);

Expectations and Local Implementation

This model policy sets forth statements of general expectations and guidelines of behavior for ordained and lay people in the church when engaged in ministry with children and youth. This policy is mandated for all such activities sponsored by every congregation, institution, organization, school and agency of each diocese. The purpose of these policies is to create a safe and welcoming space for all children and youth in our communities; and those engaged in ministry with children and youth and to prevent sexual abuse.

This policy is a model and, as such, it presents best practices for creating such safe space. Circumstances in many localities may make some of these best practices difficult to implement or even unworkable. As a result, local entities may make additions or revisions in developing local policy so long as they meet or exceed the requirements of these policies.   This requires that local leadership understand this policy thoroughly enough to make appropriate judgments about local circumstances.

Any such additions or revisions must be submitted in writing for the approval of the Bishop. No provisions may be omitted from a local policy.

Church governing bodies and all leaders should understand these policies and all local requirements thoroughly enough to make appropriate judgments, and should consult with the Office of the Bishop when unanticipated situations arise.

No policy can foresee every possible circumstance to which it may be applied. Whenever applicable, questions of civil, criminal, and/or ecclesiastical discipline and employment offenses should be addressed with the relevant authorities immediately. Please contact the Office of the Bishop for consultation and resources if assistance is needed.

DEFINITIONS

NOTE: These definitions reflect our understanding of terms describing gender identity and sexuality, which are evolving as these model policies are being written.

Adult: Anyone who is 18 years or older and not in high school. [1]

Bullying: Behavior that intimidates, humiliates, offends, degrades or harms another person, whether verbal, psychological, social, physical or otherwise.

Child: Anyone under the age of 12 years. [1]

Child Protective Services: A social services program provided by state and local governments serving children and their families who are in need of assistance. Child Protective Services receive and investigate reports of suspected abuse, neglect and exploitation.

Cisgender: An adjective describing a person whose sense of personal identity and gender corresponds with their gender or sex assigned at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Gender Non-binary: An umbrella term for people who identify their gender as neither male nor female. These people might identify as both ("bigender"), neither ("agender"), a mix between the two ("genderfluid"), or they can be unsure of their gender ("genderqueer"). This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Intake Officer: The person(s) designated by each diocese to receive information regarding an offense for which a member of the clergy may be held accountable under *Title IV of the Constitution and Canons of The Episcopal Church,* which sets out the disciplinary process for clergy. Anyone may contact an Intake Officer to report concerns.

Leader: A person, adult or youth, who, for the benefit of another, engages in ministry without responsibility for oversight of others engaged in that same ministry. Examples include Sunday school teachers, camp counselors and program teams.

LGBTQ+: An acronym for Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and others. It refers to people whose gender identities vary from their gender or sex assigned at birth, or whose sexual orientations differ from the heterosexual majority. The "+" is an effort to include additional gender identities. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Mandated Reporter: A person who is required by state law to report reasonable suspicions of abuse, neglect and/or exploitation of vulnerable populations to the appropriate state agency. State laws vary greatly. Generally, state law mandates that either all adults or adults in certain professions report suspected abuse of children and/or youth. It is imperative to know the requirements of applicable state laws. Typically, individuals who are not mandated to report suspicion of abuse may make a report to the appropriate state agency, even though not legally required to do so.

Off-site: Any location other than the sponsoring Episcopal church, institution, facility, or campus.

Organizations: All institutions for which the Diocese or congregations have legal or fiduciary responsibility (examples: diocesan departments, commissions, conference & retreat centers, adult day care centers, retirement communities, religious orders, congregations, schools, etc.).

Overnight: Any event that starts on one calendar day and ends on a different calendar day.

Pastoral Relationship: Any relationship (1) between a Member of the Clergy and any 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 Reconciliation of a Penitent, or (2) between a lay minister and any person to whom the lay minister is offering prayer, ministry, and/or any person from whom the lay minister has received sensitive, personal or confidential information in the course of offering ministry.

Programs: Official activities and programs sponsored by The Episcopal Church and its Provinces, Dioceses and congregations (examples include: The Episcopal Youth Event, Provincial Youth Events, Happening, Teens Encounter Christ, Pilgrimages, Mission Experiences, New Beginnings, camp programs, Acolyte Festival, etc.).

Public Records Check: A search of documents and data available to the public including criminal and civil court records, credit reports, and driving records from the Department of Motor Vehicles [DMV]. Typically, such searches are conducted by a third party with expertise in this area.

Responsible Person: The person designated as being accountable for compliance with this policy for an event or program.

Sacramental Use: Consecrated or unconsecrated wine used in the setting of Eucharist.

Sexual misconduct: A broad term encompassing any behavior of a sexual nature that is committed without consent or capacity for consent or by force, intimidation, coercion, or manipulation. Sexual misconduct can be committed by a person of any gender, and it can occur between people of the same or different gender.

Supervisor: A person who has oversight responsibilities for a ministry program and/or Leaders in a ministry program.

Title IV: A section of the Constitution and Canons of The Episcopal Church pertaining to clergy professional standards, accountability and ecclesiastical discipline.

Transgender: An adjective describing a person whose sense of personal identity and gender does not correspond with the gender or sex assigned to them at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Training: Organized activity designed to provide information and/or instructions to strengthen and enhance the recipient's understanding, capacity and exercise of ministry.

- **Universal Training**: A standard of training that will foster a culture of safety and inclusion for all people that includes a broad overview of issues of vulnerability, power, and healthy boundaries. This training is designed to equip all people to live out their Baptismal Covenant.

- **Specialized Training**: A standard of additional training that equips people who participate in or have oversight responsibility for ministries. In addition to Universal Training, a person will have access to training that is specialized and tailored to their role and ministry function.

Youth: Anyone who is at least twelve (12) years old, but not yet eighteen (18) years old. A youth may also be an individual who is eighteen (18) years old or older, and still in high school.[1]

Application and Screening

Dioceses, congregations and other organizations are required to screen all persons according to the standards in the **Screening and Training Protocols** (Appendix A). For some positions, screening consists only of a Public Records Check. For other positions there are additional screening requirements of a written application, interview and reference verification.

A. Public Records Checks

1. Congregations and other organizations shall use a provider approved by the diocese to conduct public records checks. Such checks must be completed before the employee or volunteer begins interacting with children and youth;
2. Criminal public records checks shall include all available criminal records and sex offender registries;
3. A Department of Motor Vehicles [DMV] records check is needed if transporting children and youth as part of, or an extension of, ministry of the church or for a church-sponsored event;
4. A credit check is required with check signing authority; and
5. Public records checks must be updated at least every five (5) years.

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[1] Ages established in accordance with generally accepted definitions in the United States. These ages may vary across the wider Episcopal Church.

B.   Written application, interview and reference verification are required before serving in certain roles and ministries as specified in the ***Screening and Training Protocols*** (Appendix A). Where required, these components are generally conducted in the following order:

1. Submission of a completed written application to serve in a specified role with a clearly defined written "job description." The application includes verifiable personal information;
2. Personal interview;
3. Reference verification conducted by congregations and other organizations to verify personal information and check references listed in the application (people who know but are not related to the applicant); and
4. Maintenance of these records as described below.

Potential Leaders or Supervisors must be known and active in the congregation for at least six (6) months before engaging in ministry with children and youth unless they are required to have public records checks and reference checks pursuant to the ***Screening and Training Protocols*** (Appendix A).

Dioceses, congregations and other organizations must keep and maintain all application and screening records secure and confidential in the Diocese, congregation's or organization's office. This includes a signature by each applicant verifying receipt of a copy of this policy, including any local procedures or variations.

Education and Training

Training shall be appropriate to each person's function according to the ***Screening and Training Protocols*** (Appendix A).

All Leaders shall have Universal Training that fosters a culture of safety and inclusion for all people and covers a broad overview of issues of vulnerability, power, and healthy boundaries. Universal Training is designed to equip all people to live out their Baptismal Covenant. All members of the Episcopal Church shall have access to this training.

In addition to Universal Training, all Supervisors and those with oversight responsibilities for ministry programs and/or other adults who engage in ministry with children and youth shall have Specialized Training that is tailored to their role and ministry function.

Depending on role and responsibility, Specialized Training should include:

• the prevention, identification and response to all forms of abuse and neglect;
• vulnerability within the pastoral relationship;
• an introduction to gender non-binary;
• the needs of LGBTQ+ children and youth;
• the ways that children and youth can engage in self-advocacy; and
• the needs of differently-abled children and youth.

Certification of training shall be renewed every three (3) years.

Dioceses, congregations and other organizations with responsibility for programs with, or services or ministries to children and youth shall keep records sufficient to evidence compliance with this policy.

Monitoring and Supervision of Programs

A Responsible Person shall monitor and supervise the behavior of adults, children and youth to ensure appropriate behavior and healthy boundaries.

All people who minister to children and youth must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Supervisor who may be parish clergy or a team leader. Such supervision shall review the scope, accountability and responsibly of the ministry with the person engaged in the ministry. Each person engaged in such ministry should know who supervises their ministry and how to contact the Supervisor at all times.

Dioceses, congregations and organizations shall ensure that all people who minister to children and youth receive prior training as to the scope, accountability and responsibility of the ministry.

Dioceses, congregations and organizations shall maintain an up-to-date list of persons with their contact information approved to minister to children and youth. This list shall be kept in the organization's office or other place where records are kept.

Unrelated Adults Required

There shall be at least two (2) unrelated adults (at least two (2) years older than the eldest participant) present at ministry settings and events designed for children and youth. If unanticipated circumstances result in an adult being alone with children or youth, that adult shall report those circumstances to the Supervisor, Clergy in charge, senior warden, or Responsible Person as soon as possible.

Only one (1) adult may be sufficient in well-monitored, visually accessible program space on the church grounds, such as a Sunday School classroom, provided that another adult can maintain visual contact with the adult program leader. This can be accomplished by designating an individual to conduct frequent random checks of classrooms and unlocked spaces throughout the building(s). These exceptional circumstances must be specifically described in a written document and approved by the governing body of the congregation. See also sections on *Overnight Programs* and *Transportation*.

Creating Safe Space for Children and Youth

To create a safe space, it is necessary to anticipate and avoid circumstances in which children and youth are exposed to inappropriate consumables, materials, unmonitored adult contact or unsupervised peer contact.

For example:

1. <u>Alcoholic beverages</u>. Alcohol (sacramental or otherwise) shall not be stored in publicly accessible areas of the church buildings.

2. Computers and electronic devices. Children and youth shall have adequate supervision when using electronic devices belonging to Dioceses, congregations and other organizations. Devices shall have adequate password protection. Each user shall have their own account and password. See Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications.

3. Persons with keys and access to locked spaces. Anyone with keys or electronic access to church buildings shall meet all the requirements for screening and training according to the Screening and Training Protocols (Appendix A).

4. Unused spaces. Spaces not in use should not be readily accessible. Given the vast differences in facilities, each Diocese, congregation, and other organization should determine how best to meet this standard.

One-to-One Conversations with Children or Youth

A. When one-to-one conversations occur between an adult and a child or youth, another unrelated adult is either to be present or capable of visually monitoring the conversation. Examples include:

1. Planned or unplanned on-site conversations can take place in a public location, away from where others can hear but in view of other adults.

2. Planned off-site conversations/meetings can take place in a public place (such as a coffee shop or restaurant) in view of other adults. A Responsible Person shall be informed about the appointment or plans in advance.

B. Confidentiality cannot be guaranteed if a child or youth discloses a situation pertaining to abuse, neglect, self-harm or exploitation because of mandatory reporting laws.

C. Impulsive, secluded or secretive activity, online or in person with children or youth, may foster a high-risk situation, and is therefore to be avoided. See Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications.

Basic Needs
No one is to be deprived of the basic human needs of food, drinking water, shelter, sleep, access to restrooms, safety and clothing at any event.

Exceptions may be made for programs intended to teach children or youth about poverty, need, and hunger, such as an intentional fasting program. In these cases, children and youth must agree to participate in writing, and parents or guardians must give written permission that includes certification that the youth or child does not have a medical condition that would put the participant at risk by fasting or missing sleep. Participants who wish to withdraw or who are unable to complete the program must have their basic needs met immediately.

Inclusiveness
No one shall be denied rights, status or access to an equal place in the life, worship, and governance

of any program or activity because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, differing abilities or socio-economic class. To the extent possible, all spaces and settings for programs, activities and ministry shall be accessible.

The Episcopal Church seeks to support all children and youth by providing reasonable alternative arrangements regardless of state law to address safety and comfort.

Transgender, genderqueer or gender non-binary children or youth who express the need or desire for increased privacy should be provided with reasonable alternative arrangements. Reasonable alternative arrangements may include the use of a private area, or a separate changing schedule, or use of a single stall restroom. Any alternative arrangement should be provided in a way that protects the child or youth's ability to keep their transgender status confidential. They should not be required to use a locker room or restroom that conflicts with their gender identity.

Safe bathroom/shower facilities will be provided by gender or specific times will be assigned to use of a single facility.

Adults should either have separate shower facilities or shower at other times than the youth. Separate dressing facilities should also be provided. See section on *Overnight Programs*.

Violence and Weapons:

- No one is to strike, hit or otherwise physically threaten or harm anyone at any time.

- Bullying of any kind by anyone is prohibited.

- Children and youth shall not have weapons of any kind at any event or program for children or youth. Exceptions to this restriction may be made for camp programs or other specific programs with prior approval.

- Report suspected violations immediately. See *Suspected Violations of this Policy.*

Behavioral Standards for Adults in Ministry with Children or Youth:
Adults who work with children and youth are expected to model the patterns of healthy relationships that children and youth deserve in all settings. Interactions should meet all requirements outlined above, and adults should be discouraged from initiating a private relationship with any unrelated child or youth from the church away from sanctioned church activities.

DOs
Adults are encouraged to:

1. Have ongoing spiritual practices, which might include: daily prayer, regular participation in corporate worship and Bible study;

2. Spend time with and listen to children and youth, and advocate for their ministry within the Body of Christ;

3.   Offer appropriate physical expressions of care, which may include:

   a.   high fives and fist bumps;
   b.   hand-holding while walking with small children or in prayer;
   c.   brief touching of shoulders, hands, or arms;
   d.   "laying on of hands" under appropriate pastoral supervision;
   e.   brief hugs and arms around shoulders; and

4.   Model appropriate affection with other adults and be accountable to the community for behavior.

DON'Ts
Adults shall not under any circumstances:

   A.   Provide children or youth with non-sacramental alcohol, marijuana, drugs, cigarettes, tobacco products, e-cigarettes, vapes or pornography;

   B.   Arrive under the influence of alcohol, illegal drugs or misused legal drugs at any children's or youth event or when they are responsible for children or youth at an event;

   C.   Consume non-sacramental alcohol or illegal drugs or misuse legal drugs at any children's or youth event or when they are responsible for children or youth at an event;

   D.   Engage in illegal behavior or permit other adults or children or youth to engage in illegal behavior;

   E.   Engage in any sexual, romantic, illicit or secretive relationship or conduct with any child or youth; or

   F.   Apart from planned pre-approved educational programs, discuss their own sexual activities, fantasies or their own use or abuse of drugs or alcohol with children or youth.

Anyone who suspects a violation of these policies shall take steps as outlined in *Section VII Responding to Concerns.*

Special Considerations for Off Site Programming
Off-site programs, trips and events are a welcome and often necessary means for spiritual, social, and emotional development of children and youth. They also present additional challenges for maintaining best practices for safe and healthy ministry. The expectations for safe space, as described above, should be observed off-site.

In the event of uncertainty about application of the policy, the Responsible Person should contact their Supervisor with the relevant queries.

Because of the unique risks that can't always be anticipated, it is important to obtain permissions and manage documentation as described below.

1. *Prior Approvals*

   - Prior approval by the governing body and the member of the clergy in charge is required; and that approval shall be reflected in the minutes of the governing body. Diocesan sponsored programs, trips or events shall receive prior Diocesan approval.

     Written parental approval is required prior to viewing any movie, whether off-site or on-site, rated "PG-13" or above or participating in any conversation or program containing sexually explicit or violent content.
   - These same prior approvals are required when the site is a private residence, hosting such events as cook outs, pool parties, progressive dinners, etc.

2. *Registration, waiver and release forms*

   A. All children, youth, and adults shall complete and sign a registration form and a waiver and release form before participating in any programs. Confidentially must be preserved with respect to medical and other sensitive information in the forms. Such forms can encompass a program year.

      1. There must be a parent/guardian's signature on all release and waiver forms for minors. Please check with your bishop's office concerning whether digital signatures are acceptable in your state.

      2. Completed release and waiver forms shall be maintained in a secure location on-site or online. Please check with your bishop's office concerning whether such forms may be saved electronically and the length of time the forms must be saved.

   B. Permission slips shall be provided for each off-site event and shall be signed by the parent/guardian.

   C. Prior permission for a minor to be photographed or recorded on film, videotape, audiotape, or other electronic media is required from a parent/guardian.

3. *First Aid and Medications*

   - Current certification in First Aid, Cardiopulmonary Resuscitation [CPR] and Automated External Defibrillator [AED] is strongly encouraged for those who work with children and youth.

   - A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location.

- A record must be kept for all medication or first aid given to a participant. This record shall include the participant's name, the date and time of service, the name of the person administering medication or treatment, and a description of the medication, dosage and/or treatment given.

- All medications (prescription and over the counter) belonging to minors shall be given to the Responsible Person, unless otherwise agreed upon by the parents and the Responsible Person. Exceptions may include inhalers, Epi-pens and birth-control pills.

- Only the Responsible Person, or their adult designee, shall administer medications.

4. *Supervision*

A. At any gathering of children or youth, there shall be at least two (2) unrelated adults with one being age twenty-five (25) or older, preferably reflecting the sex and gender identity of the participants.

B. Minimum ratios of adult to child/youth shall be in accordance with American Camp Association (ACA) guidelines as follows:

1. Five (5) years & younger — One (1) adult for each five (5) overnight-participants and one (1) adult for each six (6) day-participants

2. Six (6) to eight (8) years — 1:6 for overnight, and 1:8 for day

3. Nine (9) to fourteen (14) years — 1:8 for overnight and 1:10 for day

4. Fifteen (15) to eighteen (18) years — 1:10 for overnight and 1:12 for day

C. Additional adults can provide skills, mentorship, support, encouragement, spiritual guidance and joy.

D. When you have new leaders-in-training, the leadership teams should also have a reasonable number of experienced adult leaders to provide support.

5. *Insurance*

All trips to off-site destinations must have adequate insurance in case of emergency. For more information, contact your insurance broker.

Overnight programs
In overnight programing, particular attention will be given to historically excluded or unrecognized people, such as LGBTQ+ and differently-abled individuals. In a situation of unequal power and safety, preferences of these individuals merit additional consideration, accommodation and action to ensure:

- Participant privacy;
- Maximization of social integration of all participants;

- Minimization of stigmatization of any participants;
- Equal opportunity to participate; and
- Safety of all participants.

Other guidelines for overnight programs:

A. The safe use of restrooms and showers by all participants requires Dioceses, congregations and other organizations to consider numerous factors, including, but not limited to: age, sex, gender identity and expression, and privacy. Adults should have separate showers or separate times for showers.

B. Overnight programs shall provide safe, supervised sleeping arrangements.

1. No bed, cot or sleeping bag shall have more than one (1) person sleeping in it.
2. Supervision by two (2) unrelated adults is required in any space where one (1) or more youth are sleeping.
3. It is acceptable for all participants to sleep in the same open area when dressing rooms and bathrooms provide appropriate privacy.

C. Participants shall have access to three (3) substantial meals each full day and access to sufficient water.

D. Participants shall be given the opportunity for at least seven (7) hours of sleep each twenty-four (24) hour period, except for programs where parental/guardian permission is given to miss sleep. In these cases, children and youth must agree to participate in writing, and parents or guardians must give written permission that includes certification that the youth or child does not have a medical condition that would put the participant at risk by missing sleep.

E. Participants shall have some time set aside each day for rest or free time.

Best practice guidelines for hotel stays:

A. One (1) child or youth per bed, including cots, pullouts or hide-a-beds, and rollaway beds;

B. At least two (2) children or two (2) youth in each room.

C. Adult supervisors or chaperones have rooms on the same floor, scattered among the rooms with children or youth and at least one adult room is by the stairs or elevators;

D. Adult leader assigns rooms and room occupants;

Transportation
For the health and safety of all participants, the following practices shall be followed:

1. For events that originate and/or terminate at the Diocesan, congregation or organization's facility, all drivers must be at least twenty-one (21) years of age and provide proof of insurance and a current driver's license, a completed volunteer driver information form, and have a satisfactory DMV records check.

2. All drivers and riders must comply with state laws including seat belt and cell phone usage.

3. Parents/guardians are responsible for the transportation and safety of their children and/or youth to and from the event. This responsibility includes the transportation of any other passengers in their vehicle.

Camps and Retreat Centers
All camps, camping programs and retreat centers of the diocese shall follow the guidelines for off-site programming established in this policy. In addition, camps should aim to follow American Camp Association standards to the best of the camp's ability.

Travel
Travel with children and youth presents amazing opportunities for participants to experience the church and the world on a larger scale with vastly different perspectives of faith communities and their contexts. It also presents challenges to normal safety protocols and opportunities for creativity if managed well. The following policies will help groups prepare for a variety of potential scenarios, as well as for domestic and international travel.

A. Adult Leaders and Chaperones

1. Minimum ratios of adult to youth need to be greater due to the possibility of leaving an adult behind with a participant in the event of a medical emergency.

   a. Nine (9) to fourteen (14) years — 1:5
   b. Fifteen (15) to eighteen (18) years — 1:7

2. Regardless of group size, no group should travel with fewer than three (3) adult chaperones.

3. One (1) adult, minimum age twenty-five (25), should serve as the travel administrator who is responsible for all aspects of the trip, including carrying all necessary documentation, contacts and forms including:

   a. medical releases;
   b. media releases;
   c. community covenant;
   d. emergency contacts;
   e. itineraries; and
   f. cash and/or credit card capacity to address emergencies.

4. It is a best practice that, one (1) adult, minimum age twenty-five (25), should hold a current medical certification to manage administration of necessary and permissible medications, administer immediate and necessary first aid, and triage medical situations to determine if care of an individual needs to be taken to a higher level of care. When this is not possible, one person should be designated to supervise the administration of medications as instructed on medical release forms, and a clinic near your destination should be identified ahead of time in order to respond to health emergencies as rapidly as possible.

    Acceptable medical certifications include:

    a. Wilderness Medical Response
    b. Outdoor Emergency Care
    c. Emergency Medical Technician/Paramedic
    d. Nurse — RN/LPN/Nurse Practitioner
    e. Physician's Assistant
    f. Medical Doctor

5. Best practice is to designate an adult to serve as back-up to the travel administrator, and as back-up for simple first aid and administration of prescriptions. These could be the same person.

6. A copy of all documents should be left with an accountable person at the Diocesan, congregation or organization's office. That person should also serve as the local emergency contact person for communications between the traveling group and families at home.

B. Insurance for Travel

1. Short-term trip or supplemental insurance, available through most church and organization's policies as an added rider, must be secured at-least one month prior to travel.

2. It is recommended that all travelers carry evidence of personal health insurance by virtue of a copy of the actual card provided to the insured person.

3. Because not all individuals have access to affordable and adequate health insurance, it is recommended that health insurance be added to trip insurance.

C. International Considerations

1. Check in with the U.S. Department of State on travel requirements, including visas.

2. Make certain that every traveler's passport is valid for at least six (6) months beyond your return date.

3.   Determine whether or not vaccinations are required and/or recommended for entry into specific countries.

4.   Arrange to have at least two (2) cell phones with the group that will have active coverage in your destination(s). Make a back-up plan for communication with your responsible person at home.

5.   A more thorough list of international travel considerations with links to U.S. and global organizations can be found in the ***Youth in Mission Manual*** on The Episcopal Church website here: **http://www.episcopalchurch.org/files/7-traveling_7.pdf**

Responding To Concerns

A. Suspected Abuse, Neglect, or Exploitation of Children and Youth

Any adult who has reason to suspect that abuse, neglect or exploitation of children or youth has taken place, is strongly encouraged, and all mandated reporters are required to contact the state's Child Protective Services.

In addition, anyone who has reason to suspect that abuse, neglect or exploitation of children or youth has taken place within a facility or program of the Diocese, congregation or other organization, should immediately inform one (1) or more or the following:

- The bishop or the bishop's office in the case of a Diocese;

- Member of the clergy in charge or the senior warden in the case of a congregation;

- The director, head, or other governing officer in the case of other organizations; and/or

- The Intake Officer in case a member of the clergy is suspected of abuse, neglect and/or exploitation.

B. Suspected Violations of this Policy

Anyone who suspects a violation of these policies shall immediately report the violation to the Responsible Person, member of the clergy in charge and senior warden.

Clergy in charge receiving reports of violations of this policy shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/or disciplinary action up to and including termination of employment or unpaid ministry with the Church. If the Responsible Person is a lay person, they are responsible to ensure that appropriate pastoral care is provided for all.

Anyone who suspects a violation of these policies by a member of the clergy shall immediately report the violation to the bishop's office and/or the Intake Officer. Anyone can make a report to an Intake Officer.

The bishop, hearing reports of violations by clergy, or by laity at diocesan events, shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/ or disciplinary action, up to and including canonical disciplinary action, as provided by Title IV of the Constitutions and Canons and/or termination of employment or unpaid ministry with the Diocese.

C. Local Resources for Response

Each Diocese, congregation or Organization shall provide a list of local resources that can give information and assistance to anyone concerned about circumstances that may violate this policy. Such resources with contact information shall include:

- Responsible Person(s) for programs and ministries with children and youth;
- clergy in charge of a congregation;
- wardens;
- bishop;
- Intake Officer(s); and
- Child Protective Services.

Policy Adoption, Implementation and Audit

A. The Episcopal Church Adoption and Implementation

The Episcopal Church shall ensure that all programs and events of the Episcopal Church involving children and youth comply with the standards set out in this model policy.

The Episcopal Church shall also ensure that each diocese adopts a *Policy for the Protection of Children and Youth* in accordance with this model policy by January 1, 2019.

B. Diocesan Adoption, Implementation, and Audit

Dioceses shall adopt a *Policy for the Protection of Children and Youth* that is consistent with and/or exceeds the requirements in this model policy.

Dioceses may adopt site-specific variations from this model policy, where permitted by their governing body, which shall be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval shall be recorded in the minutes of the governing body.

The bishop or ecclesiastical authority for each diocese shall inform congregations and other organizations within the diocese of the contents of the diocesan policy, the requirement that each congregation or organization adopt a policy in accordance with the diocesan policy, and the vendor(s) approved by each diocese to conduct Public Records Checks.

Each diocese is required to conduct a **Safe Church Self-Audit** every three (3) years to confirm compliance with diocesan safe church policies.

Procedures to be confirmed by audit will include (but are not limited to):

- existence of a diocesan policy that is consistent with and/or exceeds the requirements of this model policy;
- provision of accessible and appropriate training for all those who work with children and youth in accordance with **Screening and Training Protocols** (Appendix A). Such training shall include, at a minimum, topics identified in this model policy;
- verification that each congregation and/or organization within the diocese has adopted a policy that is consistent with and/or exceeds the diocesan policy; and
- verification that each congregation and/or organization has a process to ensure members access training and conduct public record checks.

C. Congregation and Organization Adoption, Implementation, and Audit

Congregations and Organizations must adopt a **Policy for the Protection of Children and Youth** that is consistent with and/or exceeds the requirements in this model policy and the diocesan policy.

Congregations and Organizations may adopt site-specific variations from diocesan policies, where permitted by vestries or governing bodies, which shall be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval shall be recorded in the minutes of the vestry or governing body.

The **Policy for the Protection of Children and Youth** shall be posted in an area where activities take place, and shall be given to all adults, guardians, and all paid and unpaid persons who minister to children or youth. These policies shall include the names and phone numbers of the member of the clergy in charge, the senior warden, and a contact person in the bishop's office.

Each congregation and organization is required to conduct a **Safe Church Self-Audit** annually to confirm compliance with safe church policies, and to report such audit to the bishop's office.

Procedures to be confirmed by audit will include (but are not limited to):

- public record checks, application forms, records of screening and reference verification of paid and unpaid persons;
- records of compliance with **Screening and Training Protocols** (Appendix A);
- procedures for responding to concerns and incidents; and
- evidence of compliance with 'safe space'' requirements.

Appendix A — Screening and Training Protocols

Screening and Training Chart	Ministry Function	Public Records	App/Inter/Ref	Universal Training	Leader	Supervisor
Staff & Contracted Ministers (not covered below)	Church Employees	X	X	X		X
	Diocesan contractors (1099)	Depends		X	X	
	Clergy	X	X	X		X
	Church contractors (1099)	Depends		X		
	Diocesan Employees	X	X	X		X
	Diocesan Staff - unpaid	X	X	X		X
Program Supervisors						
	Child/Youth Choir Director	X	X	X		X
	Choir Director	X	X	X		X
	Commissioned Ministry Teams	X	X	X		X
	Director of Religious Education	X	X	X		X
	Camp Director	X	X	X		X
	Youth Minister	X	X	X		X
Program Participants (non-supervisory)						
	Acolyte Mentor	X		X	X	
	Choir parents			X		
	Church School Teacher	X		X	X	
	Counselor in Training	X- 18 and over	X	X	X	
	Nursery Worker - unpaid	X		X	X	
	Parish Nurse	X	X	X		X
	Teenage assistants			X	X	
	Musicians who work with youth	X	X	X		X
*Off-site	Camp Counselor	X	X	X		X
	Confirmation mentors	X	X	X	X	
	Lay Chaplains	X	X	X		X
	Pastoral Care Teams	X	X	X	X	
*Overnight	Youth Group Leaders	X	X	X		X
Drivers	Drivers	DMV		X		
Governance	Church Elected			X	X	
	Treasurer	Criminal & Credit		X	X	
	Vestry			X	X	
	Wardens	Criminal & Credit		X		X
Key Access	Altar Guild	Recommended		X		
	Building Hosts	Recommended		X		
Home Visitors	Eucharistic Visitors	X	X	X	X	
	Home Visitors	X	X	X	X	
	Stephen Ministers	X	X	X	X	
	Church Staff- unpaid	X	X	X		X

*Off-site: Any location other than the sponsoring Episcopal church, institution, facility, or campus.

*Overnight: Any event that starts on one calendar day and ends on a different calendar day.

Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications for Children and Youth

Social Media & Digital Communications Policy - Children and Youth

Social media shapes the lives of young people, and has the potential to empower ministry. Behavior in the digital sphere is never private. Posted content may be used out of context and out of the control of the originating individuals and organizations, putting them at risk. In addition, these powerfully connective tools are subject to the same dynamic of unequal power and potential for abuse that present a risk in all ministry relationships. Churches face the challenge of identifying and proactively addressing areas of potential risk in social media use in the midst of rapidly evolving technology. The following recommended practices and guidelines are designed to be a flexible template for developing policies and covenants governing the safe use of social media and digital communication in ministry settings.

General Information about Digital Communications

- All communications sent digitally (e-mail, social networking sites or platforms, notes, texts or posts, etc.) are NOT CONFIDENTIAL and can be shared or reposted to others.
- Interactions in the virtual world need to be transparent; that is, occurring in such a way that it is easy for others to see what actions are performed.
- In the virtual world, healthy boundaries and safe church practices must be adhered to as they are in the physical world.
- In the virtual world, "friend" can mean anyone with whom you are willing to communicate through that medium. In the physical world, friend can mean much more in terms of intimacy, self-disclosure, mutuality and expectations for relationship.
- Laws regarding mandated reporting of suspected abuse, neglect or exploitation of children or youth apply in the virtual world as they do in the physical world. Check your local applicable laws.

Recommended Practices and Guidelines for Churches and Organizations:

- Establish a policy that outlines professional and institutional standards for profiles and interactions on social networking sites and platforms.

- Establish a policy of transparency regarding Social Media accounts. The best practice is to have the Diocese, congregation or organization create and "own" the Social Media accounts representing the Diocese, congregation or organization respectively and have multiple administrators and/or supervisors with access. If personal accounts are used, a system of monitoring should be established.

- Establish a policy regarding the identification or "tagging" of individuals in online photos or videos. For example, on Facebook, "tagging" someone in a photo or video creates a hyperlink to that person's profile page that can be clicked by anyone. The best practice is for the Diocese, congregation or organization not to identify or "tag" individuals. The "tagging" of children and youth should be prohibited. When written permission is provided by a

parent/guardian, the captioning of photos or videos of minors may be permitted. The caption should not include the minor's full name, nor should it create a clickable link to someone's personal profile. A policy of whether or not an individual can "self-tag" in a Diocese, congregation or organization's online photo or video should also be established.

- A Diocese, congregation or organization does not have a responsibility to review or monitor the personal pages or groups that are not sponsored by that Diocese, congregation or organization, except as described in #2 above. The preceding statement should be included in the Diocese, congregation or organization's Social Media Policy.

- E-mail can be a good method of communication, and it also has the opportunity to be misunderstood. Having a clear understanding and procedure for responding to digital communication that raises concern is prudent for all. Best practices can include not responding immediately and sharing the communication with a supervisor before responding. Phone and face-to-face meetings are preferred when responding to emotionally driven communications or pastoral emergencies.

- When using photos and videos for ministry purposes, obtain a media release for each person and only post images that respect the dignity of every person depicted.

- Dioceses, congregations or organizations must inform participants when they are being videoed because church buildings are not considered public space. Signs should be posted that indicate a service or activity will be broadcast when worship services or activities are streamed or distributed on the web or via other broadcast media.

Recommended Practices and Guidelines for Interactions with Children and Youth:

1. Prudent judgement should be used in the time of day a child or youth is contacted through social media. Under normal circumstances, refrain from contact or exchanging texts, chats, or e-mails before 8:00 am or after 10:00 pm, unless it's an emergency.

2. Privacy settings and personal boundaries should be implemented.
   a. Create and use profiles on social networking sites that meet professional and institutional standards.
   b. Do not submit connection requests (such as friend requests on Facebook or "Add Me" on Snapchat) to children or youth for personal interactions. Youth may not be able to decline such requests due to the disparity of power between youth and adults. Youth may ask to be "friends," and adults should discern the nature of contact appropriate for healthy ministry.
   c. Apply privacy settings that are consistent with all children and youth, across all social networking sites and platforms. Avoid playing favorites or the appearance of playing favorites.

d. Establish a regular ongoing and consistent system of review that focuses on settings, accessible content, photos and videos to ensure compliance with professional and institutional standards.

e. Inform parents of children and youth of social networking sites and platforms used within the ministry.

f. When possible, send communication (1) to entire groups, (2) on an individual's "wall" or (3) in public areas, rather than in private messages. This includes photos, images and videos.

g. When sending emails to a child or youth that contain personal or private information regarding that child or youth, a copy should be sent to the parents or guardians as well. Examples of these types of e-mails include: payment due information, specific medical requests or questions, etc. Mass e-mails sent to an entire group are not required to be copied to parents or guardians.

h. Disclose **ongoing** digital pastoral communications (i.e.: e-mails, Facebook messages, texting, etc.) with children and youth to a parent and/or a supervisor to determine when a referral to a professional provider or resource is needed.

3. Create covenants to govern digital groups, which include:
    a. appropriate and inappropriate behavior of members (bullying, pictures that depict abuse, violence, illegal activities, sexual acts, etc.) and the consequence for inappropriate behavior;
    b. who may join and/or view group activity, when participants should leave the group and when/if the group will be disbanded;
    c. description of content that can be posted or published on the site or page;
    d. a prohibition of "tagging" photos and videos of children and youth. However, the captioning of photos and videos is permissible with written permission from a parent or guardian;
    e. notification that mandatory reporting laws will be followed; and
    f. consequences for breaking the covenant.

4. Delete inappropriate material posted in digital groups, address the behavior and report it, if necessary, in accordance with legal and institutional requirements.

5. In video calls, follow the same criteria used in telephone calls. In addition, prudent judgement regarding attire and surroundings should be observed.

6. Comply with the following best practices regarding "Groups" on Social Networking sites:

    a. Have at least two (2) unrelated adult administrators as well as at least two (2) youth administrators for groups that are designed for youth;
    b. Use closed groups, but not "hidden" or "secret" groups, for youth;
    c. Have only youth administrators invite other youth to join the online group, unless a youth previously asked an adult administrator to invite them to join;

   d.   Remove any content that shows or describes inappropriate behavior outside the bounds of the established behavioral covenant;

   e.   Open social networking groups for youth to parents of current members;

   f.   Remove adult leaders of youth groups and youth who are no longer members, due to departure, removal from position, or are ineligible because they "aged-out" of a program from social networking sites, list serves, etc.;

   g.   Observe mandated reporting laws regarding suspected abuse, neglect and exploitation.

MODEL POLICY FOR THE PROTECTION OF VULNERABLE ADULTS

This model policy includes the following segments:

- Theological and Ethical Foundations
- Expectations and Local Implementation
- Definitions
- Application and Screening
- Education and Training
- Monitoring and Supervision
- Responding to Concerns
- Policy Adoption, Implementation, and Audit
- Appendix A — Screening and Training Protocols
- Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications for Vulnerable Adults

Theological and Ethical Foundations

"And the Word became flesh and dwelt among us, full of grace and truth; we have beheld the Word's glory, glory as of the only Child from God."

          — John 1:14 (*An Inclusive Language Lectionary*)

God expressed the fullness of humanity in Jesus of Nazareth, whom we worship as the Word made flesh. To be human is to live with God and the whole of creation in the fullness of freedom and the challenge of responsibility. The pattern of Jesus' life, death, and resurrection resonates unreservedly with God's call to perfect freedom and responsibility.

In baptism, God speaking through the Church, claims us in Christ. We become in Christ the community of God's final purpose: justice and peace, love and plenty for the whole creation. This new community lives in Eucharistic fellowship with God and Creation, as a sign and instrument of God's reconciling purpose in the world.

The Church is called to embody and advance God's mission. Ministry is the vocation of the whole community: laypersons, deacons, priests, and bishops who together represent Christ and the Church in the world.

The obligation to seek and serve Christ in all persons and to respect the dignity of every human being is binding for all the baptized. The authority with which leaders — ordained persons and adults who minister with vulnerable adults — are entrusted, creates an inherent power imbalance in the pastoral relationship. This power imbalance derives from the leadership role and, in the case of clergy, the symbolic authority of an ordained person. Christian leadership is intended to provide occasions for guidance and grace, and its abuse is always and unequivocally wrong.

Ministry involves a necessary tension between a Gospel-based integrity and a Gospel-based intimacy as modeled by the life of Christ. A rigid adherence to a system of rules leads to an unproductive legalism. Yet, without the framework of the law, the intimate relationships into which Christ calls us risk distortion and harm. All the people of God are called to minister attentively within this tension. These policies are intended to provide a pattern for attentive practice of ministry.

This document is a statement for The Episcopal Church [TEC], setting forth expectations for its leaders in their relationships with vulnerable people. The purpose of these model policies is to foster the highest standards of behavior in ministry settings. The document includes:
   a. *Screening and Training Protocols* (Appendix A), which explains the level of screening and training required before engaging in ministry with vulnerable adults;
   b. A description of requisite training that is specialized and tailored to ministry role and function;
   c. Behavioral standards designed to ensure that vulnerable adults and all who engage in ministry with them are treated with dignity and respect in all settings;
   d. Social Media and Digital Communications Policy – Vulnerable Adults (Appendix B); which contains recommended Practices and Guidelines for Social Media and Electronic Communications

Expectations and Local Implementation

This model policy sets forth statements of general expectations and guidelines of behavior for ordained and lay people in the church when engaged in ministry with vulnerable adults. This policy is mandated for all such activities sponsored by every congregation, institution, organization, school and agency of each diocese. The purpose of these policies is to create safe and welcoming space for all vulnerable adults and those engaged in ministry with vulnerable adults and to prevent sexual abuse.

This policy is a model and, as such, it presents best practices for creating such safe space. Circumstances in many localities may make some of these best practices difficult to implement or even unworkable. As a result, local entities may make additions or revisions in developing local policy so long as they meet or exceed the requirements of these policies. This requires that local leadership understand this policy thoroughly enough to make appropriate judgments about local circumstances.

Any such additions or revisions must be submitted in writing for the approval of the Bishop. No provisions may be omitted from a local policy.

Church governing bodies and all leaders should understand these policies and all local requirements thoroughly enough to make appropriate judgments and should consult with the Office of the Bishop when unanticipated situations arise.

No policy can foresee every possible circumstance to which it may be applied. Whenever applicable, questions of civil, criminal, and/or ecclesiastical discipline and employment offenses should be addressed with the relevant authorities immediately. Please contact the Office of the Bishop for consultation and resources if assistance is needed.

NOTE: These definitions reflect our understanding of terms describing gender identity and sexuality, which are evolving as these model policies are being written.

Definitions

Adult: Anyone who is eighteen (18) years or older and not in high school.

Adult Protective Services: A social services program provided by state and local governments serving vulnerable adults and their families who are in need of assistance. Adult Protective Services receives and investigate reports of suspected abuse, neglect and exploitation.

Bullying: Behavior that intimidates, humiliates, offends, degrades or harms another person, whether verbal, psychological, social, physical or otherwise.

Cisgender: An adjective describing a person whose sense of personal identity and gender corresponds with their gender or sex assigned at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Gender Non-binary: An umbrella term for people who identify their gender as neither male nor female. These people might identify as both ("bigender"), neither ("agender"), a mix between the two ("genderfluid"), or they can be unsure of their gender ("genderqueer"). This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Intake Officer: The person(s) designated by each diocese to receive information regarding an offense for which a member of the clergy may be held accountable under *Title IV of the Constitution and Canons of The Episcopal Church,* which sets out the disciplinary process for clergy. Anyone may contact an Intake Officer to report concerns.

Leader: A person who, for the benefit of another, engages in ministry without responsibility for oversight of other adults engaged in that same ministry. Examples include: Eucharistic Visitors and members of pastoral care teams.

LGBTQ+: An acronym for Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and others. It refers to people whose gender identities vary from their gender or sex assigned at birth, or whose sexual orientations differ from the heterosexual majority. The "+" is an effort to include additional gender identities. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Mandated Reporter: A person who is required by state law to report reasonable suspicions of abuse, neglect and/or exploitation of vulnerable populations to the appropriate state agency. State laws vary greatly. Generally, state law mandates that either all adults or adults in certain professions report suspected abuse of elders, vulnerable and/or dependent adults. It is imperative to know the requirements of applicable state laws. Typically, individuals who are not mandated to report suspicion of abuse may make a report to the appropriate state agency, even though not legally required to do so.

Off-site: Any location other than the sponsoring Episcopal church or institutional facility or campus.

Organizations: All institutions for which the Diocese or congregations have legal or fiduciary responsibility (examples: diocesan departments, commissions, conference & retreat centers, adult day care centers, retirement communities, religious orders, congregations, schools, etc.).

Overnight: Any event that starts on one calendar day and ends on a different calendar day.

Pastoral Relationship: Any relationship (1) between a Member of the Clergy and any 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 Reconciliation of a Penitent, or (2) between a lay minister and any person to whom the lay minister is offering prayer, ministry, and/or any person from whom the lay minister has received sensitive, personal or confidential information in the course of offering ministry.

Programs: Official activities and Programs sponsored by the Episcopal Church and its provinces, dioceses and congregations.

Public Record Check: A search of documents and data available to the public including criminal and civil court records, credit reports, and driving records from the department of motor vehicles. Typically, such searches are conduct by a third party with expertise in this area.

Residential Facility: Any institutional or group home setting where a vulnerable adult resides on a permanent or temporary basis such as a nursing home, rehabilitation center, assisted living facility, treatment center or memory care facility.

Responsible Person: The person designated as being accountable for compliance with this policy for an event or program.

Sacramental Use: Consecrated or unconsecrated wine used in the setting of Eucharist.

Supervisor: A person who has oversight responsibilities for a ministry program and/or leaders in a ministry program.

Title IV: A section of the Constitution and Canons of The Episcopal Church pertaining to clergy professional standards, accountability and ecclesiastical discipline.

Transgender: An adjective describing a person whose sense of personal identity and gender does not correspond with the gender or sex assigned to them at birth. This is an evolving term, as our understanding and language around gender identity and sexuality expands and matures.

Training: Organized activity designed to provide information and/or instructions to strengthen and enhance the recipient's understanding, capacity and exercise of ministry.
- **Universal Training:** A standard of training that will foster a culture of safety and inclusion for all people that includes a broad overview of issues of vulnerability, power, and healthy

boundaries. This training is designed to equip all people to live out their Baptismal Covenant.

- **Specialized Training**: A standard of additional training that equips people who participate in or have oversight responsibility for ministries. In addition to Universal Training, a person will have access to training that is specialized and tailored to their role and ministry function.

Vulnerable Adult:

a. any adult at or older than the age designated as an elder by applicable state law;
b. any adult who is infirm or diminished in capacity due to age, illness or disability;
c. any adult who is ministered to in their home (by Eucharistic Visitors, Pastoral Care Visitors, Stephen Ministers, or others);
d. any adult who is wholly or partially dependent upon one (1) or more other persons for emotional, psychological or physical care or support, such dependency may be temporary as in the case of an accident, illness, or birth of a child; and
e. any adult who by virtue of a crisis, experiences vulnerability leading to dependency on another or lacks agency in a pastoral relationship as in the wake of death of a family member or job loss.

Application and Screening

Dioceses, congregations and other organizations are required to screen all persons according to the standards in the *Screening and Training Protocols* (Appendix A). For some positions, screening consists only of a Public Records Check. For other positions there are additional screening requirements of a written application, interview and reference verification.

A. Public Records Checks

1. Congregations and other Organizations shall use a provider approved by the diocese to conduct public records checks. Such checks must be completed before the employee or volunteer begins programmatic interaction with vulnerable adults;

2. Criminal public records checks shall include all available criminal records and sex offender registries;

3. A Department of Motor Vehicles [DMV] records check is needed if transporting vulnerable adults as part of, or an extension of, ministry of the church or for a church-sponsored event;

4. A credit check is required of treasurers and those with check signing authority; and

5. Public records checks must be updated at least every five (5) years.

B. Written application, interview and reference verification are required before serving in certain roles and ministries as specified in the *Screening and Training Protocols* (Appendix A). Where required, these components are generally conducted in the following order:

1. Submission of a completed written application to serve in a specified role with a clearly defined written "job description." The application includes verifiable personal information;

2. Personal interview;

3. Reference verification conducted by congregations and other organizations to verify personal information and check references listed in the application (people who know but are not related to the applicant); and

4. Maintenance of these records as described below.

Potential leaders or supervisors must be known and active in the congregation for at least six (6) months before engaging in ministry with vulnerable adults unless they are required to have public records checks and reference checks pursuant to the *Screening and Training Protocols* (Appendix A).

Dioceses, congregations and other organizations must keep and maintain all application and screening records secure and confidential in the Diocese, church or organization's office. This includes a signature by each applicant verifying receipt of a copy of this policy, including any local procedures or variations.

Education and Training

Training shall be appropriate to each person's function according to the *Screening and Training Protocols* (Appendix A).

All Leaders shall have Universal Training that fosters a culture of safety and inclusion for all people and covers a broad overview of issues of vulnerability, power, and healthy boundaries. Universal Training is designed to equip all people to live out their Baptismal Covenant. All members of the Episcopal Church shall have access to this training.

In addition to Universal Training, all Supervisors and those with oversight responsibilities for ministry programs and/or other adults who engage in ministry with Vulnerable Adults shall have Specialized Training that is tailored to their role and ministry function.

Depending on role and responsibility, Specialized Training should include:
a. the prevention, identification and response to all forms of abuse and neglect including financial exploitation;
b. mandated and voluntary reporting of suspected abuse, neglect and exploitation of vulnerable adults;
c. vulnerability within the pastoral relationship;
d. an introduction to gender non-binary;
e. the needs of aging LGBTQ+ individuals who often struggle to find care or residential facilities adequately equipped to meet their needs; and
f. the ways that vulnerable adults can engage in self-advocacy.

Certification of training shall be renewed every three (3) years.

Dioceses, congregations and other organizations with responsibility for programs with, or services or ministries to vulnerable adults shall keep records sufficient to evidence compliance with this policy.

Monitoring and Supervision of Programs

All people who minister to vulnerable adults and/or have pastoral relationships with others must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Supervisor who may be parish clergy or a team leader. Such supervision shall review the scope, accountability and responsibly of the ministry with the person engaged in the ministry. Each person engaged in such ministry should know who supervises their ministry and how to contact the Supervisor at all times.

Dioceses, congregations and organizations shall ensure that all people who minister to vulnerable adults receive prior training as to the scope, accountability and responsibility of the ministry.

Dioceses, congregations and organizations shall maintain an up-to-date list of persons with their contact information approved to minister to vulnerable adults and/or engage in pastoral relationships with others. This list shall be kept in the organization's office or other place where records are kept. It is best practice for those ministering to vulnerable adults to document their visits, including time, place and any observations or concerns. Such documentation is reviewed by the Supervisor. Confidentiality among clergy and lay ministers is required and all documentation is kept confidential. This documentation promotes continuity of care and transparency in ministry.

All new activities that include pastoral relationships and/or ministry to vulnerable adults shall have a Responsible Person to monitor and supervise all events to ensure appropriate behavior and healthy boundaries.

A. Presence of Unrelated Adults Suggested

While not required, it is best practice for those ministering to vulnerable adults, or in the homes of others, to do so with another trained adult minister present. Those engaged in such ministries should minister in pairs.

If a Diocese, congregation, or organization's policy requires that there be two (2) unrelated adults present and if circumstances result in a minister being alone with a vulnerable adult, that minister shall report this to the Supervisor, clergy, senior warden or Responsible Person as soon as possible.

B. Creating Safe Space for Pastoral Relationships and/or Ministry with Vulnerable Adults
To create a safe space, it is necessary to anticipate and avoid circumstances that could result in exposure of vulnerable adults to undue influence or exploitation. On-site and off-site settings for ministry with vulnerable adults and pastoral relationships and conversations should:
    A. Be in places where casual monitoring by others is convenient; and
    B. Convey safety and comfort.

C. Inclusiveness

No one shall be denied rights, status or access to an equal place in the life, worship, and governance of any program or activity because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, differing abilities, socio-economic class or age. To the extent possible, all spaces and settings for programs, activities and ministry shall be accessible. The Episcopal Church seeks to support all persons by providing reasonable alternative arrangements regardless of state law to address safety and comfort.

Transgender, genderqueer, or gender non-binary adults who express the need or desire for increased privacy should be provided with reasonable alternative arrangements. Reasonable alternative arrangements may include the use of a private area, or a separate changing schedule, or use of a single-stall restroom. Any alternative arrangement should be provided in a way that protects the adult's ability to keep their transgender status confidential, if they so desire.

Transgender, genderqueer or gender non-binary adults should not be required to use a locker room or restroom that conflicts with their gender identity. Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned for the use of a single facility).

D. Violence

1. No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
2. No one is to control or attempt to control another by bullying, intimidation, threats, verbal/emotional abuse or isolation from others. Bullying of any kind by anyone is prohibited.
3. Report suspected violations immediately. See *Suspected Violations of this Policy.*

E. Behavioral Standards for Ministry with Vulnerable Adults

All who work with vulnerable adults are expected to model the patterns of healthy relationships. To this end, lay and ordained ministers working with vulnerable adults shall:
   a. Take care not to unduly influence a person to whom they minister;
   b. Accept only token gifts from those to whom they minister. Ministers given gifts shall report those gifts in writing to their Supervisor, clergy, senior warden, or Responsible Person;
   c. Decline to accept loans of any kind from those to whom they minister;
   d. Decline to agree to be named as a beneficiary or to act as an administrator or executor in a will of anyone to whom they minister; and
   e. Inform Supervisor, clergy, senior warden, or Responsible Person of anything that causes concern for the safety or wellbeing of those to whom they minister.

DO's

All who minister to vulnerable adults are encouraged to:

a. have ongoing spiritual practices, which might include daily prayer, regular participation in corporate worship and Bible study;

b. spend time with and listen to vulnerable adults, and advocate for their ministry within the Body of Christ;

c. offer appropriate physical expressions of affection, as long as they are welcomed by the recipient. These may include:

　　1. brief hugs;

　　2. pats on the shoulder or back;

　　3. kisses on the cheek;

　　4. handshakes;

　　5. holding hands during prayer; and

d. maintain healthy boundaries when sharing personal information.

DON'Ts

Adults shall not under any circumstances:

a. provide vulnerable adults with non-sacramental alcohol, marijuana, illegal drugs, cigarettes, e-cigarettes, vapes, or pornography;

b. arrive under the influence of alcohol, illegal drugs, or misuse of legal drugs when they are responsible for or ministering to a vulnerable adult;

c. consume non-sacramental alcohol or illegal drugs or misuse legal drugs when they are responsible for or ministering to a vulnerable adult;

d. engage in illegal behavior or permit others to engage in illegal behavior; or

e. engage in any sexual, romantic, illicit or secretive relationship or conduct with any vulnerable adult.

F.　　Visits to Private Residences

The safety of all persons and healthy boundaries are essential when visiting a vulnerable adult in a private home.

- Avoid situations that might compromise privacy; common examples include:
  - Visiting behind closed bedroom doors;
  - Sitting on the bed of the person being visited; or
  - Visiting a person while they are not fully clothed.

- The best practice is to visit in teams of two (2) or more. If it is not possible for another adult minister to be present, a member of the vulnerable adult's household should be present. If neither is possible, documentation of the time, duration of visit, general matters discussed, and any pastoral concerns shall be provided to the Supervisor as soon as possible after the visit.

G. Visits to Residential Facilities

The safety of all persons and healthy boundaries are also essential when visiting a vulnerable adult in a Residential Facility. Best practices include:

a. Facility staff should be informed of the visitor's presence;
b. If a visit takes place out of sight of staff, they should be notified in advance and informed when such meeting is concluded.;
c. The door to a resident's private room must remain open during visits;
d. Visitors should be mindful that LGBTQ+ residents may not be safe to express their sexual identity or orientation, as staff members may not yet have been trained; and
e. In the event of uncertainty about application of this policy, the visitor is encouraged to contact their Supervisor with the relevant queries.

H. Off-site Visits, Events, and Programs

Off-site programs, trips and events are a welcome and often necessary means for spiritual, social, and emotional wellbeing of vulnerable adults. They also present additional challenges for maintaining best practices for safe and healthy ministry. The expectations for safe space, as described above, should be observed off-site.

In the event of uncertainty about application of this policy, the Responsible Person should contact their Supervisor with the relevant queries.

Because of the unique risks that can't always be anticipated, it is important to obtain permissions and manage documentation as described below.

5. Prior Approvals

- Prior approval by the governing body and the member of the clergy in charge is required; and that approval shall be reflected in the minutes of the governing body. Diocesan sponsored programs, trips or events shall receive prior Diocesan approval.

- These same prior approvals are required when the site is a private residence, hosting such events as cook outs, progressive dinners, etc.

In the event of uncertainty, the Responsible Person should contact the bishop's office with the relevant information.

2. Registration, Waivers, and Release Forms

Due to the unique risks of off-site visits, events and programs that cannot always be anticipated, it is important to obtain permissions and manage documentation as described below.

A. All participants shall complete and sign a registration, waiver and release before participating in any program. Confidentiality must be preserved with respect to medical information.

1. There must be a signature on all release and waiver forms. If a person is unable to consent due to impairment or lack of agency then the signature of that person's guardian, spouse or other trusted family member is required. Applicable state law determines whether digital signatures are acceptable.

2. Completed release and waiver forms shall be maintained in a secure location on-site. Check with the bishop's office regarding whether such forms may be saved electronically and how long they must be retained.

B. Permission slips shall be provided for each event and shall be signed by the vulnerable adult, guardian, spouse, or other trusted family member.

C. Prior permission for an individual to be photographed or recorded on film, videotape, audiotape, or other electronic media is required.

3. First Aid and Medications

Current certification in First Aid, Cardiopulmonary Resuscitation [CPR] and Automated External Defibrillator (AED) is strongly encouraged for those who work with vulnerable adults.

- A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location.
  If a vulnerable adult requires assistance with medications of any type, then a record must be kept for all medication or first aid given to a participant. This record shall include the participant's name, the date and time of service, the name of the person administering medication or treatment, and a description of the medication, dosage and/or treatment given.

- All medications (prescription and over the counter) belonging to vulnerable adults requiring assistance with medications shall be given to the Responsible Person, unless otherwise agreed upon.
- Only the Responsible Person, or their adult designee, shall administer medications.

I. Transportation
For the health and safety of all participants, the following practices shall be followed:
a. For events that originate and/or terminate at the Diocesan, congregation or organization's facility, all drivers must be at least twenty-one (21) years of age and provide proof of insurance and a current driver's license, a completed volunteer driver information form, and have a satisfactory DMV records check;
b. A list of those approved to provide transportation to vulnerable adults shall be maintained in the office of the organization;
c. Anyone being transported must consent to such transportation beforehand. If a person is unable to consent due to impairment or lack of agency then prior approval by that person's guardian, spouse or other trusted family member is required; and
d. All drivers and riders must comply with state laws including seat belt and cell phone usage.

J. Insurance for Overseas Pilgrimages and Mission Trips
a. Short-term trip or supplemental insurance, available through most church and organization's policies as an added rider, must be secured at-least one month prior to travel.

b. It is recommended that all travelers carry evidence of personal health insurance by virtue of a copy of the actual card provided to the insured person.

c. Because not all individuals have access to affordable and adequate health insurance, it is recommended that health insurance be added to trip insurance.

K. International Considerations

1. Check in with the U.S. Department of State on travel requirements, including visas.

2. Make certain that every traveler's passport is valid for at least six (6) months beyond your return date.

3. Determine whether or not vaccinations are required and/or recommended for entry into specific countries.

4. Arrange to have at least two (2) cell phones with the group that will have active coverage in your destination(s). Make a back-up plan for communication with your responsible person at home.

L. Conference and Retreat Centers

All conference and retreat centers of the Diocese, congregations and organizations shall follow the guidelines for off-site Programming established in this policy.

Responding To Concerns

A. Suspected Abuse, Neglect, or Exploitation of a Vulnerable Adult

Anyone who has reason to suspect that abuse, neglect or exploitation of a vulnerable adult has taken place, is strongly encouraged, and all mandated reporters are required to contact the state's Adult Protective Services.

In addition, anyone who has reason to suspect that abuse, neglect or exploitation of a vulnerable adult has taken place within a facility or program of the Diocese, congregation or other organization, should immediately inform one (1) or more or the following:

- The bishop or the bishop's office in the case of a Diocese;

- Member of the clergy in charge or the senior warden in the case of a congregation;

- The director, head, or other governing officer in the case of other organizations; and/or

- The Intake Officer in case a member of the clergy is suspected of abuse, neglect and/or exploitation.

B. Suspected Violations of this Policy

Anyone who suspects a violation of these policies shall immediately report the violation to the Responsible Person, member of the clergy in charge and senior warden.

Clergy in charge receiving reports of violations of this policy shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/or disciplinary action up to and including termination of employment or unpaid ministry with the Church. If the Responsible Person is a lay person, they are responsible to ensure that appropriate pastoral care is provided for all.

Anyone who knows of a violation of these policies by a member of the clergy shall immediately report the violation to the bishop's office and/or the Intake Officer. Anyone can make a report to an Intake Officer.

The bishop, hearing reports of violations by clergy, or by laity at diocesan events, shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/ or disciplinary action, up to and including canonical disciplinary action, as provided by Title IV of the Constitutions and Canons and/or termination of employment or unpaid ministry with the Diocese.

C. Local Resources for Response

Each Diocese, congregation or Organization shall provide a list of local resources that can give information and assistance to anyone concerned about circumstances that may violate this policy. Such resources with contact information shall include:

- Responsible Person(s) for programs and ministries with vulnerable adults;
- clergy in charge of a congregation;
- wardens;
- bishop;
- Intake Officer(s); and
- Adult Protective Services.

Policy Adoption, Implementation and Audit

A. The Episcopal Church Adoption and Implementation

The Episcopal Church shall ensure that all programs and events of The Episcopal Church involving vulnerable adults comply with the standards set out in this model policy.
The Episcopal Church shall also ensure that each diocese adopts a *Policy for the Protection of Vulnerable Adults* in accordance with this model policy by January 1, 2019.

B. Diocesan Adoption, Implementation, and Audit

Dioceses shall adopt a *Policy for the Protection of Vulnerable Adults* that is consistent with and/or exceeds the requirements in this model policy.

Dioceses may adopt site-specific variations from this model policy, where permitted by their governing body, which shall be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval shall be recorded in the minutes of the governing body.

The bishop or ecclesiastical authority for each diocese shall inform congregations and other organizations within the diocese of the contents of the diocesan policy, the requirement that each congregation or organization adopt a policy in accordance with the diocesan policy, and the vendor(s) approved by each diocese to conduct Public Records Checks.

Each diocese is required to conduct a *Safe Church Self-Audit* every three (3) years to confirm compliance with diocesan safe church policies.

Procedures to be confirmed by audit will include (but are not limited to):

- existence of diocesan policy that is consistent with and/or exceeds the requirements of this model policy;
- provision of accessible and appropriate training for all those who work with vulnerable adults in accordance with *Screening and Training Protocols* (Appendix A). Such training shall include, at a minimum, topics identified in this model policy;
- verification that each congregation and/or organization within the diocese has adopted a policy that is consistent with and/or exceeds the diocesan policy; and
- verification that each congregation and/or organization has a process to ensure members access training and conduct public record checks.

C. Congregation and Organization Adoption, Implementation, and Audit

Congregations and Organizations must adopt a *Policy for the Protection of Vulnerable Adults that* is consistent with and/or exceeds the requirements in this model policy and the diocesan policy.

Congregations and organizations may adopt site-specific variations from diocesan policies, where permitted by vestries or governing bodies, which shall be described in detail, including the circumstances under which those variations are to be permitted and their rationale. This approval shall be recorded in the minutes of the vestry or governing body.

The *Policy for the Protection of Vulnerable Adults* shall be posted in an area where activities take place, and shall be given to all adults, guardians, and all paid and unpaid persons who minister to vulnerable adults. These policies shall include the names and phone numbers of the member of the clergy in charge, the senior warden, and a contact person in the bishop's office.

Each congregation and organization is required to conduct a *Safe Church Self-Audit* annually to confirm compliance with safe church policies, and to report such audit to the bishop's office.

Procedures to be confirmed by audit will include (but are not limited to):
- public record checks, application forms, records of screening and reference verification of paid and unpaid persons engaged in ministry with vulnerable adults;

- records of compliance with **Screening and Training Protocols** (Appendix A);
- procedures for responding to concerns and incidents; and
- evidence of compliance with 'safe space" requirements.

Appendix A — Screening and Training Protocols

Screening and Training Chart	Ministry Function	Public Records	App/Inter/Ref	Universal Training	Leader	Supervisor
Staff & Contracted Ministers (not covered below)	Church Employees	X	X	X		X
	Diocesan contractors (1099)	Depends		X	X	
	Clergy	X	X	X		X
	Church contractors (1099)	Depends		X		
	Diocesan Employees	X	X	X		X
	Diocesan Staff - unpaid	X	X	X		X
Program Supervisors						
	Child/Youth Choir Director	X	X	X		X
	Choir Director	X	X	X		X
	Commissioned Ministry Teams	X	X	X		X
	Director of Religious Education	X	X	X		X
	Camp Director	X	X	X		X
	Youth Minister	X	X	X		X
Program Participants (non-supervisory)						
	Acolyte Mentor	X		X	X	
	Choir parents			X		
	Church School Teacher	X		X	X	
	Counselor in Training	X- 18 and over	X	X	X	
	Nursery Worker - unpaid	X		X	X	
	Parish Nurse	X	X	X		X
	Teenage assistants			X	X	
	Musicians who work with youth	X	X	X		X
*Off-site	Camp Counselor	X	X	X		X
	Confirmation mentors	X	X	X	X	
	Lay Chaplains	X	X	X		X
	Pastoral Care Teams	X	X	X	X	
*Overnight	Youth Group Leaders	X	X	X		X
Drivers	Drivers	DMV		X		
Governance	Church Elected			X	X	
	Treasurer	Criminal & Credit		X	X	
	Vestry			X	X	
	Wardens	Criminal & Credit		X		X
Key Access	Altar Guild	Recommended		X		
	Building Hosts	Recommended		X		
Home Visitors	Eucharistic Visitors	X	X	X	X	
	Home Visitors	X	X	X	X	
	Stephen Ministers	X	X	X	X	
	Church Staff- unpaid	X	X	X		X
*Off-site: Any location other than the sponsoring Episcopal church, institution, facility, or campus.						
*Overnight: Any event that starts on one calendar day and ends on a different calendar day.						

Appendix B — Recommended Practices and Guidelines for Social Media and Electronic Communications for Vulnerable Adults

Social Media & Digital Communications Policy - Vulnerable Adults

Social media is an ever increasing part of adult lives, and has the potential to empower ministry. Behavior in the digital sphere is never private. Posted content may be used out of context and out of the control of the originating individuals and organizations, putting them at risk. In addition, these powerfully connective tools are subject to the same dynamic of unequal power and potential for abuse that present a risk in all ministry relationships. Churches face the challenge of identifying and proactively addressing areas of potential risk in social media use in the midst of rapidly evolving technology. The following recommended practices and guidelines are designed to be a flexible template for developing policies and covenants governing the safe use of social media and digital communication in ministry settings.

General Information about Digital Communications

- All communications sent digitally (e-mail, social networking sites or platforms, notes, texts or posts, etc.) are NOT CONFIDENTIAL and can be shared or reposted to others.
- Interactions in the virtual world need to be transparent; that is, occurring in such a way that it is easy for others to see what actions are performed.
- In the virtual world, healthy boundaries and safe church practices must be adhered to as they are in the physical world.
- In the virtual world, "friend" can mean anyone with whom you are willing to communicate through that medium. In the physical world, friend can mean much more in terms of intimacy, self-disclosure, mutuality and expectations for relationship.
- Laws regarding mandated reporting of suspected abuse, neglect or exploitation of vulnerable adults apply in the virtual world as they do in the physical world. Check your local applicable laws.

Recommended Practices and Guidelines for Churches and Organizations:

1. Establish a policy that outlines professional and institutional standards for profiles and interactions on social networking sites and platforms.

2. Establish a policy of transparency regarding Social Media accounts. The best practice is to have the Diocese, congregation or organization create and "own" the Social Media accounts representing the Diocese, congregation or organization respectively and have multiple administrators and/or supervisors with access. If personal accounts are used, a system of monitoring should be established.

3. Establish a policy regarding the identification or "tagging" of individuals in online photos. For example, on Facebook, "tagging" someone in a photo or video creates a hyperlink to that person's profile page that can be clicked by anyone. The best practice is for the Diocese,

congregation or Organization not to identify or "tag" individuals. The "tagging" of vulnerable adults should be discouraged. The captioning of photos or videos may be permitted when written permission is provided by a vulnerable adult (or the person's guardian, spouse or other trusted family member when the vulnerable adult is unable to consent due to impairment or lack of agency). The caption should not include the individual's full name, nor should it create a clickable link to someone's personal profile. A policy of whether or not an individual can "self-tag" in a Diocese, congregation or organization's online photo should also be established.

4. A Diocese, congregation or organization does not have a responsibility to review or monitor the personal pages or groups that are not sponsored by the Diocese, congregation or organization respectively, except as described in #2 above. The preceding statement should be included in the Diocese, congregation or organization's Social Media Policy.

5. E-mail can be a good method of communication, and it also has the opportunity to be misunderstood. Having a clear understanding and procedure when responding to digital communication that raises concern is prudent for all. Best practices can include not responding immediately and sharing the communication with a supervisor before responding. Phone and face-to-face meetings are preferred when responding to emotionally driven communications or pastoral emergencies.

6. When using photos and videos for ministry purposes, obtain a media release for each person and only post images that respect the dignity of every person depicted.

7. Dioceses, congregations or organizations must inform participants when they are being videoed because church buildings are not considered public space. Signs should be posted that indicate a service or activity will be broadcast when worship services or activities are streamed or distributed on the web or via other broadcast media.

Recommended Practices and Guidelines for Vulnerable Adults:

1. Prudent judgement should be used in the time of day a vulnerable adult is contacted through social media. Under normal circumstances, refrain from contact or exchanging texts, chats, or e-mails before 8:00 am or after 10:00 pm, unless it's an emergency.

2. Privacy settings and personal boundaries should be implemented.

   a. Create and use profiles on social networking sites that meet professional and institutional standards.
   b. Apply privacy settings that are consistent with all vulnerable adults, across all social networking sites and platforms. Avoid playing favorites or the appearance of playing favorites.
   c. Establish a regular ongoing and consistent system of review that focuses on settings, accessible content and photos and videos to ensure compliance with professional and institutional standards.

d. When possible, send communication (1) to entire groups, (2) on an individual's "wall" or (3) in public areas, rather than in private messages. This includes photos, images and videos.

e. Disclose **ongoing** digital pastoral communications (i.e.: e-mails, Facebook messages, texting, etc.) with a vulnerable adult to a supervisor to determine when a referral to a professional provider or resources is needed.

3. Create covenants to govern digital groups, which include:

   a. appropriate and inappropriate behavior of members (bullying, pictures that depict abuse, violence, illegal activities, sexual acts, etc.) and the consequence for inappropriate behavior;

   b. who may join and/or view group activity, when participants should leave the group and when/if the group will be disbanded;

   c. description of content that can be posted or published on the site or page;

   d. discourage "tagging" photos and videos of vulnerable adults. However, the captioning of photos and videos is permissible with appropriate written permission as described above;

   e. notification that mandatory reporting laws will be followed; and

   f. consequences for breaking the covenant.

4. Delete inappropriate material posted in digital groups, address the behavior and report, if necessary, in accordance with legal and institutional requirements.

5. In video calls, follow the same criteria used in telephone calls. In addition, prudent judgement regarding attire and surroundings should be observed.

6. Comply with the following best practices regarding "Groups" on Social Networking sites:

   a. Have at least two (2) unrelated administrators.

   b. Use closed groups, but not "hidden" or "secret" groups, for vulnerable adults;

   c. Remove any content that shows or describes inappropriate behavior outside the bounds of the established behavioral covenant; and

   d. Observe mandated reporting laws regarding suspected abuse, neglect and exploitation.

OTHER REPORTS TO THE 79TH GENERAL CONVENTION

Board for Transition Ministry

Board of Episcopal Relief and Development

Board of the Archives of The Episcopal Church

Board of Trustees of the Church Pension Fund

Board of Trustees of the General Theological Seminary

Disciplinary Board for Bishops

Forward Movement

General Board of Examining Chaplains

Investigation of Prison Conditions

Response to Racial Injustice (2015-C019)

THE BOARD FOR TRANSITION MINISTRY

Membership

Ms. Judith A. Stark, *Chair*	Southwest Florida, IV	2018
The Rev. Canon Stuart Wright, *Secretary*	Maryland, III	2018
The Rev. Paula Clark	Washington, DC, III	2021
The Rev. Canon Elizabeth Easton	Nebraska, VI	2021
The Rt. Rev. Douglas Fisher	Western Massachusetts, I	2021
The Rt. Rev. Ann Elliott Hodges-Copple	North Carolina, IV	2018
Canon Jill Mathis	Pennsylvania, III	2021
Mrs. Denise Obando	California, VIII	2021
The Rev. Canon James H. Pritchett, Jr.	Western North Carolina, IV	2018
The Rt. Rev. Allen Shin	New York, II	2021
The Rt. Rev. Kirk Stevan Smith	Arizona, VIII	2018
Mr. Michael P. Spencer	Eastern Michigan, V	2018
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	2018
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	2018

CHANGES IN MEMBERSHIP

No changes in membership.

Representation at General Convention: Bishop Douglas Fisher and Ms. Judy Stark are authorized to received non-substantive amendments to this Report at General Convention.

Mandate

Canon III.16.1 - 2
Sec. 1 (a) There shall be a Board for Transition Ministry of the General Convention consisting of twelve (12) members, four (4) of whom shall be Bishops, four (4) of whom shall be Presbyters or Deacons, and four (4) of whom shall be Lay Persons. (b) The Bishops shall be appointed by the Presiding Bishop. The Priests or Deacons and Lay Members shall be appointed by the President of the House of Deputies. All appointments to the Board shall be subject to the confirmation of the General Convention. (c) The Members shall serve terms beginning with the adjournment of the meeting of the General Convention at which their appointments are confirmed, and ending with the adjournment of the second regular meeting thereafter. The members shall not serve successive terms. (d) At each regular meeting of the General Convention one-half of the membership shall be appointed to serve full terms. (e) Vacancies shall be filled by appointment by the Presiding Bishop or by the President of the House of Deputies, as

appropriate. Such appointments shall be for the remaining unexpired portion of the members' terms, and, if a regular meeting of the General Convention intervenes, appointments for terms extending beyond such meetings shall be subject to confirmation of the General Convention. Members appointed to fill the vacancies shall not thereby be disqualified from appointment to full terms thereafter.

Sec. 2. The duties of the Board shall be: (a) To oversee the Office for Transition Ministry. (b) To provide support for the training of bishops and diocesan personnel in the transition ministry processes. (c) To study the transition ministry needs and trends in the Episcopal Church and in other Christian bodies. (d) To issue and distribute such reports and information concerning transition ministry as it deems helpful to the Church. (e) To cooperate with the Centers for Mission and the other Boards, Commissions, and Agencies which are concerned with transition ministry, and particularly with the Executive Council. (f) To report on its work and the work of the Office for Transition Ministry at each regular meeting of the General Convention. (g) To report to the Executive Council annually as a part of its accountability to the Council for the funding which the Office for Transition Ministry receives. (h) To work in cooperation with the Church Center Staff. (i) To fulfill other responsibilities assigned to it by the General Convention.

SPECIFIC MANDATE FROM GC78

Resolution 2015- A031 Continue Development of the Clergy Search Toolkit:

> *Resolved*, **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 2016-2018 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 allocate $20,000 to continue to develop the search toolkit and for resources such as expanded development of online materials, Spanish translation and videography.**

Resolution 2015- A031 calls for the continued development of search toolkit resources for female clergy and Church leadership discernment committees. It also calls on bishops and other diocesan leaders to urge the search toolkit's use by search committees and transition ministries.

Summary of Work

MEETINGS

The Board met in person at the Maritime Center in Linthicum Heights, MD, in November 2015; at the Oak Ridge Conference Center in Chaska, MN, October 5-7, 2016; and again at the Maritime Center in March 2017. The board also held Adobe Connect teleconferences in January, April, and July of 2016 and in January, August and November of 2017.

This has been a triennium of extraordinary progress, accomplishment and health for the Board for Transition Ministry. In both concrete actions and in thoughtful conversation we have addressed the needs of a changing church.

We have come to think of transition ministry as a pipeline: from those who first begin to feel a call to ordained ministry, to diocesan Commissions on Ministry that listen for that call; to the seminaries that train prospective clergy, or the formation that occurs within the diocese; and on to the first calls and succeeding careers and retirement.

At every step, all of us are challenged to acknowledge the evolving needs of the church; the skills clergy must possess today and tomorrow -- which may be very different from what was needed in the past; and the expectations of what a career in the church will look like -- which may be very different from what was promised in the past. We wondered aloud whether each part of the pipeline is aware of how the other parts view the world and how we are preparing clergy to deal with reality.

When we gathered at the Maritime Center in November 2015 for our first meeting as a newly constituted board; we thought out loud about what the priests of tomorrow might look like. Here are some notes from our flip chart about what they might have/do/be: "Tattoos … an online dating profile … a first language other than English … a first vocation … a second job … a same-gender spouse … a way of relating to the community other than through church (be in a band)."

Now that we think of it, that describes many of our clergy today. Our point (and recent Church Pension Group information supports this): The old model of being a priest (full-time, for one church at a time, with uninterrupted service as he — and in the old days it was always "he" — moved up the ladder with regular salary increases) is rapidly fading.

As we thought more about what we are transitioning from ... and transitioning to ... one of our members, Bishop Doug Fisher of Western Massachusetts, proposed an "Invitation to the Church" -- to wonder and ponder with the Board, an opportunity to engage the wider church in a conversation about the trends and challenges we see. We don't have the answers. The wisdom comes from all around the church. Since we released the Invitation in Spring 2017, we have had positive feedback. The Invitation has been used to start conversations at clergy days, at diocesan conventions, and in other contexts around the church. The "Invitation to the Church" is posted on the Episcopal Church website (www.episcopalchurch.org/page/invitation-church). We hope to gather and share more feedback with the wider church.

The specific points we called out -- which are echoed in the reports of many other interim bodies -- are: the aging church (both clergy and parishioners), dual-call couples, energy beyond the parish (non-traditional, non-parochial ministry), diversifying clergy, interim ministry, part-time clergy leadership, full-communion partners, effective ministry in multicultural settings, the call process now, and the facts about transition ministry today.

We are all part of the pipeline. The fact that these topics come up again and again in various contexts and from various viewpoints suggests that these are, indeed, the conversations we need to be having. The end of this triennium does not mean the end to the conversations.

CURRENT DEVELOPMENTS

The board recognizes a number of trends in transition ministry, many of which overlap. As the availability of full-time clergy positions declines, the need for part-time and bi-vocational ordained leadership grows. That raises questions about formation, time, compensation, stewardship of resources, and expectations for the congregation and its spiritual leader. Both must learn to live into the opportunity for spiritual growth and renewal available through a different kind of leadership model.

Women clergy, clergy of color and LGBTQ clergy continue to face conscious or unconscious bias in the calling process. Women are disproportionately represented in part-time, interim, supply and non-stipendiary calls. That impacts their career-long earning capability and their ultimate pension. (CPG has documented an earnings gap of nearly twenty (20) percent between men and women.) Compensation parity is a justice issue for the Church, and the Board has voted to support Proposed Resolution A091: Amend Canon III.9 Equity in Clergy Hiring and Appointment Practices, put forward by the Standing Commission on Structure, Governance, Constitution & Canons, urging pay parity.

We have established a relationship with the Church Pension Group this triennium. Their Executive Vice President, the Rev. Anne Mallonee, and their Senior Vice President for Research and Data, Matthew Price, were our guests on one of our quarterly conference calls, and the board chair was an invited responder at the "Insights and Ideas" Centennial Conversation in New York City in September 2017. This is a relationship we are eager to cultivate.

PERMANENT MISSIONER

In May 2016 the Presiding Bishop named the Rev. Meghan Froehlich to the permanent position of Missioner for Transition Ministry, a position she had held on an acting basis since January 2015. Her thorough knowledge of the transitions process, her strong relationships with diocesan transition ministers and others throughout the church, and her technical "under-the-hood" abilities made her an ideal choice. The Office for Transition Ministry has grown, strengthened, and made itself even more valuable to the wider church under our new missioner's leadership and with the strong backup at the Church Center of Sabrina Nealy, Systems Coordinator and Associate for the Office for Transition Ministry. Together they present a positive, helpful, and professional face to the constituents we serve.

OFFICE FOR TRANSITIONAL MINISTRY [OTM] PORTFOLIO DATABASE

The Office for Transition Ministry Portfolio database is a service of the Episcopal Church to assist churchwide in search and call processes for clergy, lay leaders, and worshiping communities. The Office for Transition Ministry [OTM] staff offer individualized assistance to all users through telephone, video, and email support.

As technology has changed rapidly in recent years, the database is in the process of updating and improving. The Board for Transition Ministry, Diocesan Transition Ministers, bishops, and other Portfolio users highlighted areas for improvement. Updates are under way in the areas of:

* User experience improvement, including ease of use

* Stability and full functionality on mobile, tablet, laptop, and desktop platforms

* Cross-platform reliability (use on PC, Mac, Linux, all website browsers)

* Search functions

* Strengthening information security

In the next triennium, with input from users, improvements can be expected in the areas of:

* Simplifying compensation information pages

* Mapping available positions

* Specialized search and output options

* Any needed data security

* Changes identified by primary users and others, with guidance from the Board

NATIONAL GATHERING OF DTMS

Another important accomplishment of this triennium is the decision -- in response to great demand from diocesan transition ministers [DTMs] -- to facilitate a churchwide gathering of DTMs, the first since a meeting in conjunction with the 2011 CODE conference in Minneapolis. This is now scheduled for March 26-29, 2019, at the conference center in the Diocese of Utah.

This gathering will respond to our mandate to provide training, support and professional development for those involved in transition ministry and to educate DTMs and others about the resources available through the Office for Transition Ministry (website, mobile tools) and the changing nature of transition ministry (much of which is highlighted elsewhere in this report).

EXPANDING THE TOOL KIT

Resolution 2015-A031, approved by the 78th General Convention, called on the board to expand the online search tool kit created in 2015 in response to a previous General Convention resolution (www.episcopalchurch.org/page/cast-wide-net).

We are doing so by:

- refreshing and updating existing material (new CPG compensation report, for example);

- adding material on dual-call couples (of which there are now five hundred (500) in the Episcopal Church) created by the Rev. Diane Vie as part of her doctoral work;

- offering new material on how to read a parish or diocesan profile

- providing a list of "Do's and Don'ts" for women seeking the episcopate

We expect this new material will be posted by the first quarter of 2018.

TRAINING

The most visible work of Diocesan Transition Ministers (DTMs) involves collaborating, as a member of the bishop's staff, with clergy and congregations as they discern new clergy leadership for a worshipping community. This process is implemented differently in each diocese and is tailored to meet the needs of each congregation.

DTMs must be imaginative leaders who educate their diocesan staffs, their searching congregations and their candidates about the changing expectations, needs and creative challenges we face as a church, as we've discussed above.

For new Transition Minsters, developing the required relational and technical skills for this complex responsibility takes time -- time that is mostly in short supply, as position openings do not follow any schedule. The board seeks to offer options for training new DTMs and supporting their ongoing work.

Diocesan Transition Ministers [DTMs] serve in an increasing variety of configurations on bishops' staffs. Some are full-time with transition ministry as their only responsibility; some are part-time with compensation; some serve as DTMs while also serving as rectors and are uncompensated, and many also serve as Canon to the Ordinary with multiple areas of responsibility. Some new DTMs have their predecessor available as a resource; others do not. Some new DTMs have prior experience with transitions; others are new to this specialized ministry area. In some dioceses the bishop is the transitions minister and may require unique training.

Training for new DTMs comes from three (3) major sources. Over the last triennium, the two (2) staff members of the Office for Transition Ministry have provided individualized training and ongoing support for new DTMs. Other training and support come from other DTMs, often from a neighboring or similar diocese. A third source is the regional transition ministry groups consisting of one or more provinces. These groups typically meet twice a year and offer formal or informal training and for new DTMs.

Our national gathering of DTMs, proposed for 2019, will add a fourth opportunity for leaders in transition ministry to strengthen their skills. Given that much of the work of finding good candidates involves networking and relationships, the value of this time together should not be underestimated.

The board is considering developing a checklist of skills and questions that acknowledges the differences among diocesan processes and insures that DTMs receive training in all necessary areas. The OTM missioner attends many of the regional meetings and can share best practices regarding training among the regional groups.

WIDER CONVERSATIONS

As trends in transition ministry are showing increasing changes across the church, several groups have convened conversations that include Bishops, Diocesan Transition Ministers, Commissions on Ministry, and theological formation leaders.

Province III has convened a "Calling the Future Church" conversation annually for the last two (2) years, and has addressed topics that included diversity, how people are called into ministry, whether formation leads to the kinds of leadership that the church needs, how to better equip lay leadership for the changing church, creative ways to offer collaborative formation, ways to more deeply engage collaboration among Episcopal churches and beyond Episcopal churches. Other regional groups have hosted similar conversations and plans are increasing to have future similar discussions.

EPISCOPAL RELIEF & DEVELOPMENT BOARD

Membership

Mr. Daniel McNeel 'Neel' Lane, *Chair*	West Texas, VII	2018
Ms. Shirley Stover Allen	Texas, VII	2020
Ms. Rosalie Simmonds Ballentine	The Virgin Islands, II	2018
Mr. Franklin Berger	New York, II	2016
Ms. Meredith Brown	Long Island, II	2017
Ms. Lindsay Coates	Washington, III	2017
Mr. Mark D. Constantine	Virginia, III	2019
The Rt. Rev. Mary Gray-Reeves	El Camino Real, VIII	2019
Ms. Meg L. DeRonghe	Olympia, VIII	2019
Ms. Josephine Hicks	North Carolina, IV	2016
Ms. Sophie Hollingsworth	Ohio, V	2018
The Rev. David C. Killeen	Florida, IV	2018
The Rt. Rev. Jeffrey D. Lee	Chicago, V	2020
Mr. John A. 'Jock' MacKinnon	New York, II	2018
Dr. Robert McCouch	Long Island, II	2020
Dr. Chiseche Salome Mibenge	California, VIII	2020
Ms. Judith Morrison	Washington, III	2017
Ms. Laura Ellen Muglia	Olympia, VIII	2018
The Rev. Steven Paulikas	Long Island, II	2020
Ms. Constance Perry	Massachusetts, I	2016
The Rt. Rev. Wilfrido Ramos-Orench	Puerto Rico, IX	2019
The Rev. Canon Genevieve Razim	Texas, VII	2020
The Rt. Rev. Prince Singh	Rochester, II	2016
The Rev. Canon E. Mark Stevenson	Louisiana, IV	2017
Mr. Thomas W. Stoever, Jr.	Colorado, VI	2020
Mr. N. Kurt Barnes, *Ex-Officio*	New York, II	
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	
Dr. Robert W. Radtke, President, *Ex-Officio*	New York, II	
The Rev. Geoffrey T. Smith, *Ex-Officio*	New Hampshire, I	

Key Staff:

Ms. Mary Carr, Manager of the Executive Office & Director of Special Projects

Ms. Esther Cohen, Chief Operating Officer

Ms. Abagail Nelson, Senior Vice President for Programs

Representation at General Convention:

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

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)

Summary of Work

CORE VALUES

As part of the Episcopal branch of what our Presiding Bishop, The Most Reverend Michael B. Curry, calls The Jesus Movement, seeking and serving Christ in all people near and far, everything we do and the way in which we do it is inspired by five (5) core values:

Faith

Faith in Jesus is at the center of our mission as an organization. It gives us the power and the courage to follow Jesus' example by reaching out in compassion to serve the most

marginalized and respond to human suffering.

Dignity

We respect the dignity of every human being, seeking and serving Christ in all people as they, in turn, empower themselves and transform the communities in which they live and work.

Relationship

Our relationships are the foundation upon which all our work is built. As we accompany and serve our partners, we nurture and sustain our relationships, thereby unlocking abundance wherever it may be.

Leadership

We lead through learning and collaboration, inspiring creativity and innovation in all aspects of our work, and cherishing the many gifts God has given to our partners and to us.

Excellence

Being, doing, and giving our very best is how we are good stewards of God's abundance.

Every action we take is measured against these core values.

SUSTAINABLE DEVELOPMENT GOALS

The Sustainable Development Goals [SDGs] also known as the Global Goals, build on the work of the Millennium Development Goals [MDGs]. Established by the international community in 2000, the MDGs were eight (8) goals focused on reducing the number of people who live in extreme poverty by the end of 2015. The MDGs targeted a range of development issues such as poverty, hunger, disease, gender inequality and access to clean water and sanitation. Inspired by these global goals, all of Episcopal Relief & Development's international development programs seek to mobilize local resources and expertise toward sustainable, community-led programs that address poverty, hunger and disease.

OUR PROGRAM APPROACH

Episcopal Relief & Development's international partnerships address challenges in some of the most remote areas of the world, as well as in urban environments where extreme poverty persists. In many of these places, the Church is often one of the few institutions people trust and turn to for help in the absence of government systems and services.

Instead of imposing "one-size-fits-all" solutions, we support unique, local long-term initiatives that address the effects of poverty, disaster and disease. Through our Asset-Based Community Development methodology, we work with communities to recognize their existing skills, gifts and resources. Thus, we empower and work alongside local leaders and residents who are best equipped to identify and address the most pressing needs.

Working with local church partners around the Anglican Communion as well as local organizations and ecumenical agencies, our integrated programs use local resources and expertise to help communities transform themselves. We partner with three (3) million people in close to forty (40) countries.

COMMITMENT TO DISASTER PREPAREDNESS AND RESPONSE

Since our founding in 1940, as the Presiding Bishop's Fund for World Relief, in the midst of World War II we have been committed to providing disaster relief. We are committed to responding to disasters and rebuilding communities by reaching those at risk of falling through the cracks, and accompanying them through a full and sustained recovery.

To this end, Episcopal Relief & Development is working with global Anglican partners to better prepare for and respond to disasters, whether natural or human-made. At the core of this goal is our Disaster Risk Reduction and Management Initiative and new "Pastors and Disasters" tool-book of core competencies and standards, best practices and case studies.

Our U.S. Disaster Program connects, equips and inspires leaders of U.S. dioceses to prepare for hazards that might affect their communities, to mitigate the impact of disasters and to help vulnerable people make a full and sustained recovery. We have a full on-line resource library, network of diocesan coordinators, expert volunteer consultants and regional trainings.

NEW STRATEGIC PLAN

Unlocking Abundance: A Strategic Plan to Serve Communities and Families Around the World is our theme for 2019-2021. It is taken from John 10:10, "I came that they may have life, and have it abundantly."

In late 2015, as we were concluding our 75th Anniversary Celebration, Episcopal Relief & Development began a deep and searching strategic planning process. We engaged the entire staff, the board, and stakeholders across The Episcopal Church, the Anglican Communion, and around the world in a discernment process to identify the key priorities of the organization for its next strategic period. The work was guided by an ad-hoc committee of the board under the leadership of The Right Reverend Prince Singh.

Over the course of the planning process, several questions guided our discernment process:

- What makes Episcopal Relief & Development unique?
- Are there any distinctive competencies or strengths that set the organization apart?
- Compared to other relief and development organizations what does Episcopal Relief & Development do that other organizations cannot or do not do as well?
- Looking forward, in the next three (3) to five (5) years, where do you think Episcopal Relief &

Development's biggest opportunity to make a difference will be?

The answers to these questions shaped the plan and the priorities, goals and objectives that we have identified as we, on behalf of The Episcopal Church, work to end extreme poverty. Out of this process our work will focus on three (3) programmatic priorities:

Early Childhood Development

Thanks to our work at the household level, Episcopal Relief & Development and our partners are uniquely placed to reach children (who are usually the most vulnerable members of communities) and to support life-saving behaviors and improve lives.

All the evidence across multiple indicators shows that early interventions, starting at conception and up to sixty (60) months, lead to healthier children and better outcomes for a lifetime. In this work, health interventions target the prevention and treatment of malaria, diarrhea and pneumonia along with the key drivers of wellbeing, including water, sanitation, hygiene and nutrition.

Furthermore, in this work we have the opportunity to build on the foundation of our award-winning NetsforLife® program partnership, through which we have trained thousands of community health workers, and our current work focused on helping children impacted by HIV/AIDS. We should seize it, sharing our experience and knowledge broadly, to drive change beyond the footprint of our own work.

Combatting Gender-Based Violence

Combatting Gender-Based Violence [GBV] is a ministry of reconciliation that is vital to our work. GBV is both traumatic and an expression of trauma. Furthermore, it is deeply entrenched in the communities where Episcopal Relief & Development and its partners are present, particularly in post-conflict societies.

Faith leaders and communities have a unique role to play in addressing GBV and healing individuals and communities. Often people suffering from GBV turn to the Church for help. At the same time, the Church and faith leaders are sometimes part of the problem in communities. Educating and equipping faith leaders and their communities to recognize, address and fight GBV is something that Episcopal Relief & Development can do that others are less able to do. The initial results of this work hold the promise of changing not only individual lives, but the way the world addresses this critical challenge.

Resilience & Climate Change

Churches and church communities have an important role to play in building resilience and helping those around them reduce the risk of and prepare for disasters on their own behalf and on behalf of vulnerable members of their communities. Houses of worship are the first place that people turn to in times of disaster. Furthermore, faith communities remain essential actors long after the television cameras have been turned off and attention moves on. Episcopal Relief & Development is unique

amongst organizations in the United States and throughout the Anglican Communion in equipping faith leaders for ministry in preparation for and in times of disaster.

Moreover, we have learned from our work in the international context that there is a close relationship between disaster risk reduction and climate change adaption and mitigation. In the United States, we are already responding to the increase in natural disasters brought about by climate change. However, we do not yet have the answers to how we should address climate change adaption and mitigation from a strategic perspective as part of our U.S. program. We will study and reflect on how we can move from being reactive to being proactive in this emerging area in the United States.

Holistic Approach

These three (3) programmatic priorities, Early Childhood Development, Combatting Gender-Based Violence and Resilience & Climate Change, are high-leverage opportunities for Episcopal Relief & Development. We have unique capacities in these areas and, if we can use them effectively and holistically, the communities we serve will be better off. Furthermore, we can provide leadership in the relief and development community, sharing our knowledge and experience and driving change above and beyond our own programmatic reach.

At the same time, it is important to emphasize that while the organization will continue focus on these three (3) priorities and leveraging its expertise to drive change both where we work and more broadly, we will continue to offer a rich menu of programs that complement and support these priorities.

We are not abandoning our work in micro-finance, clean water, or climate-smart agriculture. Indeed, success in these areas is essential to accomplishing our goals in the three (3) priorities named above and are vital to the overall viability of our programs. Nothing sustainable can be achieved with respect to our three (3) priorities without a fully integrated and holistic approach to development.

"Go with the people. Live with them. Learn from them. Love them. Start with what they have. Build on what they know. But with the best leaders, when the work is done, the task accomplished, the people will say, 'We have done this ourselves'."

-- Lao Tsu, Chinese Philosopher, 700 B.C.

THE BOARD OF THE ARCHIVES OF THE EPISCOPAL CHURCH

Membership

Ms. Pan Adams-McCaslin, *Chair*	Western North Carolina, IV	2021
The Rt. Rev. R. William Franklin, *Vice Chair*	Western New York, II	2021
The Rev. Dr. Brian K. Wilbert, *Secretary*	Ohio, V	2021
Ms. Anne E. Bardol	Northwestern Pennsylvania, III	2021
Ms. Kay Bishop	California, VIII	2021
Dr. Frederick W. (Ted) Gerbracht, Jr.	Long Island, NY II	2021
Mr. Lawrence R. Hitt II, Esq.	Colorado, VI	2018
The Rev. Dr. Robert F. Pace	Northwest Texas, VII	2018
The Hon. Byron Rushing	Massachusetts, I	2018
The Rev. Robert L. Sessum	Lexington, Kentucky, IV	2018
The Rt. Rev. G. Porter Taylor	Western North Carolina, IV	2021
Mr. Mark J. Duffy, *Canonical Archivist, Ex-Officio*	Texas, VII	
The Most Rev. Michael Bruce Curry, *Ex-Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex-Officio*	Ohio, V	

CHANGES IN MEMBERSHIP

The Rev. Jennifer Baskerville-Burrows, Chicago, resigned in 2016. The Rt. Rev. Gary R. Lillibridge, West Texas, resigned in 2017.

Mandate

The Board of the Archives of the Episcopal Church is authorized under Canon I.5.3, which states that the Board has the duty to set policy for the Archives, elects the Archivist of the Episcopal Church, gives direction to and sets forth the terms and conditions for the work of the Canonical Archivist. The Board meets annually or more often as required, elects officers, and creates committees as necessary. The Archive Board adopts procedures consistent with the Constitution and Canons and reports to the General Convention, and the Executive Council, through the office of the Executive Officer of General Convention. The expenses of the Board and the Archives are shared by the General Convention and the Executive Council.

Summary of Work

MEETINGS

The Board met twice in person and three (3) times by teleconference in this triennium. The Executive Committee (comprising the three (3) officers, Board member at large Larry Hitt, and the Archivist) conferred in telephone conference nine (9) times. The Chair communicated regularly with the Canonical Archivist to provide counsel, coordinated his annual performance review, and assisted in weighing strategic priorities in light of the many demands of the building program, fund-raising, and operations. The Archivist has attended meetings of Executive Council and reported to its committees on behalf of the Board.

The Board's membership and officers underwent an unusually high turnover in this triennium due to transitions and resignations, which required the new members to do some fast learning as we discerned our way through an organization in transition. The Board's time together was spent examining four areas of concern. These were: (1) the work of the Archives and the Archivist, (2) progress on the evolving building enterprise, (3) the first truly serious focus on fund raising and development; and (4) governance responsibilities and clarity of authority. The building and fund raising are obviously linked and are discussed together below. We list them as separate concerns to emphasize the additional responsibilities and expectations they have on staff, and the unexpected insights we have gained from exposure to a wider stakeholder community within the Church. The Board's education about the potential for evangelism and reconciliation in the Archive's mission has been an eye-opening and rewarding experience for all the officers and members.

OVERSIGHT AND DIRECTION

An important part of every meeting with the Archivist is a review of the work and future direction of the archival program and its staff. The Archivist's report, which is attached, speaks to the scope of the duties and accomplishments in the triennium. The detail is a summary, however, and does not do full justice to the enthusiasm and dedication of our talented staff and their commitment to the mission of The Episcopal Church.

The Board has noted in its discussions with the Archivist several areas of shared concern. With the loss of staffing during the economic downturn, he was asked to identify the impact on program and these impacts have occurred, specifically in the area of records intake and processing, cataloging, and inventory management. These basic archival functions began falling behind just at the time when electronic media and advanced technology tools became the principal and routine way of keeping records. The added responsibility of digital records management has strained the staff who must continue to pay attention to the accumulated records of our analog past.

In response, the Board supported a 2019-2021 budget request to restore the Archives staff to a full complement by adding a technical specialist position. Acting on initial feedback for budgetary restraint from the Executive Council's finance committee, we revised our request and opted for less costly use

of consultants.   We are convinced, however, that temporary worker contracts beyond their current limited use are not conducive to consistent quality and steady management of specialized archival operations. A positive development in 2017 was the change in the Episcopal Church Center's IT office, which could help bridge major gaps that the Archivist has identified in the organization's electronic records systems.

ARCHIVES BUILDING AND FUND RAISING

The Board has greeted with enthusiasm Presiding Bishop Curry's endorsement of the Archives building project.   Together with President Jennings's long-time support of the Archives, we have in place a team of leaders to assist the Archivist in achieving a favorable outcome for this long-delayed goal. The Archivist's attached report gives specifics on the recent benchmark events.

The Board's role has been to receive reports from our diligent and innovative project consultant, the Rev. Lang Lowrey, and to evaluate our progress in achieving the best archival repository the Church can construct to safeguard our past. We have pressed the consultant to hold fast in his negotiations to accomplish several priorities:

- Obtain the fullest possible utilization of square footage for the storage *and* educational program of the Archives as the central repository for the historical records of The Episcopal Church.

- Provide sufficient additional space to augment archival functions with meeting and exhibit areas that are welcoming to the community of Episcopal visitors and the public.

- Negotiate property development that sheds light on the needs of and does no harm to the local population, many of whom are citizens without homes and permanent shelter.

- Provides sufficient amenities for staff and sponsored research such as parking, transportation, and accommodations to make it amenable to easy access and staff recruitment.

- Create a sustainable building project by utilizing environmentally sound building materials and providing endowment funds to support maintenance and upkeep of the building and its systems.

Sustainability of program and operation has been a guiding mantra since the first building design plans were drawn in 2009.   The Archives Board and the several committees tasked to guide this development have been faithful in pressing for a plan that does not financially burden the future Church.   While the General Convention and Executive Council have generously funded the programmatic budget of the Archives, we recognize the need for endowment to carry the costs of a bricks and mortar operation.

What has been interesting to the Board is the information the Archivist and fundraising staff have received in interviews with major donors in the early phase of fund raising in 2016-2017. We learned that donors are highly concerned that their dollars not only go towards a project that will make a difference, but also that the Domestic and Foreign Missionary Society [DFMS] will use the funds now

and in the future exclusively for the Archives. They want to know that the Archives is governed appropriately and that the Church has the structures in place that guarantee a professional operation. These are goals the Archives Board shares and which compelled us to look seriously at our governance responsibilities and oversight accountability.

The Church is likely to begin construction of a 64,000 sq. ft. state-of-the-art archives building with meeting space in a highly visible urban setting. The facility will have a realized value in excess of $30 million at opening – with no capital expenditure by the Society. It will become a more valuable asset in years to come. The management, care, and planning for a facility of this magnitude has heightened awareness among Board members and others in the organization. A positive partnership with the DFMS Development Office has led to the first professional and hopeful measure of progress in meeting a fund-raising goal of $12 to $15 million for endowment.

The challenge remains, therefore, for the Board and Church to imagine a stable future in which the Archives Board can attract ongoing financial support from Episcopalians and granting agencies for its specific area of historical mission. The General Convention's authorization in resolution in 2012–A162 to establish a foundation-type, nonprofit DFMS subsidiary received careful independent legal review. The proposal would assure 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), while enhancing gifts and effective management of assets. It would be extremely valuable if Executive Council and the administration endorse the wisdom of this plan or an alternative model of long-term sustainable support.

FURTHER STRENGTHENING OF GOVERNANCE

The Board devoted much time in the triennium addressing a concern expressed at times by Executive Council members, donors and management about the Archives Board as a self-governing entity within the General Convention and the DFMS. At moments of institutional change such as occurred with Presiding Bishop Curry's election, questions of clarification in direction and accountability are expected. The Board is also highly sensitive to the impact of a center for The Episcopal Church that is dedicated to advancing its identity and visibility outside the administrative headquarters in New York.

The Archives Board's Executive Committee, in consultation with the Canonical Archivist and Director, has explored these matters at some length and shared its thinking with the Presiding Bishop. The result is a clearer understanding of the Board's stewardship responsibilities, which are framed in the 1985 Canon on Archives. The Archivist, serving as the professional and fiduciary agent, is both a member of the Board and an employee of the Domestic and Foreign Missionary Society [DFMS]. As executive director, the Archivist brings the interests of all the principals in the organization into a creative balance to achieve the mission of the Archives and the Church.

The Archives of the Episcopal Church exists in an ecclesiastical government that is historically a blend of hierarchical and mutual interdependence. Since its inception, the Archives has been located under

the oversight of a body that has exercised its historical mandate with some degree of independence from the administrative bodies of the Church. This once-removed distance from corporate management control is similar to civil governmental archives. It is also typical of institutional archives in religious bodies (as opposed to special collections libraries). The Episcopal, Presbyterian, Methodist and Southern Baptist archives all operate with board structures that oversee the operation in close cooperation with their mission and administrative units. The General Convention's Archives Board underscores the broad interpretation of, and accountability to, "the Church".

The Canonical Archivist has executive responsibility for the curatorial operation, policy development and implementation, staff oversight and administration of the Church's archives and its records management program. While the Archivist reports to the Board in the exercise of the office, he or she is the designated custodian of the corporate records and acts as a DFMS employee. Thus, the Archivist has a legal and fiduciary accountability to the Chief Executive Officer (the Presiding Bishop) or his or her designee. As a member of the Board, the Archivist also reports to the appropriate Standing Committee of Executive Council on matters of importance affecting the archives or the management of DFMS records.

These multi-directional reporting relationships are critical to ensure confidence, trust, loyalty, and support for an operation that oversees records of high confidentiality across the organization, protection of privileged corporate communication, and professional management of the intellectual assets of the Society and The Episcopal Church. They have also proved helpful in key administrative decisions, particularly affecting finance, budget, and information management.   The Board's independence from internal political influence and protection of the Archives' professional program from interference are further buffered by the Board's reporting channel to Executive Council and General Convention, which is strengthened by the position of the Executive Officer of General Convention, through whom it reports to these bodies.

The Presiding Bishop's vision to bring The Jesus Movement and evangelism into all aspects of the Church's ministry has called for flexible organizational structures. Developing a consensus on an understanding of the Archives' unique position in the governance structure of The Episcopal Church in a descriptive way to capture its multi-directional accountability has been a point of continued effort and tested relationships even during this triennium. The Board is committed to working with Executive Council and the presiding officers to realize future structures for the Archives that will serve the life-giving mission of the Church.

Budget

BUDGET APPROPRIATION REQUEST, 2019–2021 TRIENNIUM

Archives and Records Management

Salaries and Benefits	$2,664,226
Rent and Storage	210,000
Operations	475,035
Information and IT Services	73,776
Digital Archives/Electronic Records	375,000
Total	$3,798,037

Board of the Archives

Board Meetings	$36,000

Report of The Canonical Archivist

Solid progress can be reported in this triennium towards achieving the goal of a home repository for the Church's archives. It is an accomplishment that occurs appropriately at a time when much good is happening for The Episcopal Church. Adversarial and broken relationships have receded in the flood of energy that has accompanied the call for a Christ-centered evangelism that embraces all and repositions the Church and its bodies toward repairing the worn fabric of Creation. The call to heal and serve others makes the inward-dwelling struggles over structure, authority, and position seem like time-worn vestments of another age. This is a gift to all those who, like the Archives Board and staff, are engaged in the reconciling mission of the General Convention and the Domestic and Foreign Missionary Society [DFMS]. Even as we approach a moment when the Archives' physical security and visibility are within our grasp, our efforts in education, preservation, and institutional support are more extensive than at any time in the recent past.

When the General Convention enacted the new canon on the Archives and established an oversight Board in 1985, it recommitted the Church to the care of its institutional history. That carefully crafted canon echoed a bold 1835 precedent when the nascent Episcopal Church first claimed its history by naming a conservator of archives to shape an identity fit for a new nation. In shaping its mission in the 1990s, the Archives Board adopted two (2) visionary goals. The first was to renew the entire collection management, acquisition, and research program to capture the undocumented voices of The Episcopal Church and to acquaint Episcopalians with a part of their history that had been marginalized by writers, scholars and story tellers. The second, more daunting goal was to elevate the Archives

from a best kept secret to a place of prominence, visibility and voice. A team came together in 2006 to create a visionary but achievable plan to build the Church's first archival repository. The ups and downs of the ensuing decade did not thwart galvanizing leadership of key individuals on the Board, the Executive Council, and from other quarters of the Church. Big picture thinkers, supported by thoughtful experts, took a measured risk on a reasonable plan based on institutional sustainability and a belief in the historical record as essential to the Church's culture of evangelism.

We expect to find fruition in 2018 with the start of construction on a new and permanent facility for The Archives of The Episcopal Church. The Archives ability to realize the potential of its historical and educational programming will be greatly leveraged by bringing all the historical collections together for the first time. A building designed to function as an archives rather than a storage box will allow us to effectively manage and preserve the Church's holdings, which date from the 18th century and earlier. We will also be able to welcome Episcopalians and other visitors to a highly visible public venue where our world-wide story can be prominently featured. The year ahead requires us to raise an endowment for the future support of the building and historical activities for the whole Church.

If this report were only a measure of the time and energy of the past triennium, it would be largely a report on the progress we have made with the building and development program. Much more has been accomplished, however, in our historical and information management duties. Our hope is that the next triennial report will bring to a conclusion this long journey to achieve the most basic archival requirement: an actual place called "the archives." It will be a significant accomplishment to have obtained a research center for The Episcopal Church at virtually no required cost to the DFMS or the General Convention.

RESEARCH SERVICES
The Research Services desk responded to one thousand (1000) research questions in 2015, eight hundred and two (802) in 2016, and five hundred and fifteen (515) in 2017. The annual counts show a steady decrease from previous years. The difference owes to the use of a more precise contact form on TEC's website and the Archives' site (**http://episcopalarchives.org**), which improved filtering of ephemeral questions. New staff expanded use of digital resources on the Archives' website; and adherence to a free research time limit of thirty (30) minutes also account for these smaller numbers.

Institutional Research
The raw totals above belie the scope of the priority research that we perform for internal governance, administration and legal inquires. Church agency and interim body requests involve considerable original research, digitization, and consulting and although they amount to just 20% of the requests, they account for about 70% of the time. Internal requests typically result in a formal Archives Research Report and it is not unusual that they are accompanied by a digital library of resources for interim bodies. Institutional requests during the three (3) year period 2015–2017 led to forty-three (43) research reports for bodies or officers of the DFMS. This activity is supplemented by the many

numerous research reports prepared in 2015 leading up to General Convention. The range of topics is indicated by the following partial list of research products.

- Episcopal Indian Boarding Schools were researched for a compilation in support of Native American ministry reconciliation around the institutional practice of racism.

- A website and report on anti-racism efforts informed a Convention resolution to restore a canonical mandate on multicultural training in preparation for ministry.

- A web microsite and digital library was created for the Task Force on the Episcopacy.

- A status report was prepared on the trial liturgies for the Church Calendar over the past decade affecting *Lesser Feasts and Fasts, Holy Women, Holy Men,* and *Great Cloud of Witnesses.*

- The history and agreements on the source and use of United Thank Offering [UTO] trust funds was reported including the historical relationship of UTO, ECW, and the Women's Triennial.

- Digitization and case history research was conducted for the White and Dykman Revision Committee on Ecclesiastical Discipline and included a website for future data sharing.

- The relationship of General Theological Seminary to General Convention was reported.

- A white paper and research data on GC resolution 2015–D037 addressed best practices for when amending names and identity in parish and other Church records.

- The genesis of the office of Bishop Suffragan was detailed noting periodic reexaminations of the purpose and jurisdictional standing of the office.

- The Archives commented in detail for the Standing Commission on Liturgy and Music's proposal to analyze church service data to prepare for Prayer Book revision.

- A history of the Church's ethnic and social service ministries and the related interim bodies was completed for the Structure Commission.

- Staff traced the history of the Government Relations Office for a self-study. The report covered the 1978 origins through its most active development during the 1980s to the early 2000s.

- Historical reports and some websites were prepared on the following topics:

    - Election and installation practices of Presiding Bishops

    - Episcopal Church's Response to the Treatment/Care of Alcoholism and Alcoholics

    - Funding system for the Budget of The Episcopal Church

    - Intention, use, and management of the Conant Fund Trust

    - Authorized agreements and texts of ecumenical dialogues and consultations

    - General Convention's provincial governance system

    - DFMS's minority bank investment program

    - The Episcopal Church in Cuba

External Research

Among the external inquiries were several that entailed extensive use of the holdings including: the Episcopal Church's oversight commission for Native Americans; Martin Luther King, Jr.'s relationship with the Episcopal Society for Cultural and Racial Unity [ESCRU]; the Church's historic stance on slavery; the early missions in the Philippines; the Cape Palmas mission in Liberia; Cathedral Films; Hudson Stuck's Alaskan diaries; the Protestant response to immigration in the early 20th century; the history of Psalter revision; the life and work of James DeKoven; Paul Rusch and The Episcopal Church in Japan; William Stringfellow; St. Paul's Normal School in Virginia; Mary Elizabeth Wood and The Boone Library; the history of the ministry to the deaf; the Liberian Church after 1980; the Japanese Episcopal Mission in Los Angeles; and the Church's expansion of Christian social relations ministry.

Website Research

The Archives' website presents a compelling indication of the reach of our information services. Principally through the Digital Archives (over 40% of current web use), historical data can be easily searched for use in parish education, advocacy on public issues, Church-wide documentation standards and public inquiry. The number of unique URL hosts (or individual users) served by the Archives' website grows incrementally:

- 102,278 unique individual users in in 2015

- 113,751 in 2016

- and a dramatic increase to 229,763 as of December 1, 2017.

Another surprising statistic is a new count of document downloads from the website, which amounted to 193,571 digital objects in 2017. The recent jump in users and downloads is highly likely the result of newly published data and the release of a refreshed Drupal-based website.

DIGITAL ARCHIVES AS EVANGELISM

Digital content publication is the main vehicle by which the Archives communicates important themes in its historical holdings and collaborates with Episcopal agencies, offices, and donors to create special exhibits and corpora for publication. The curators are intent on achieving high quality control when authenticating published records as the Digital Archives are used as trusted surrogates for the originals in historical research. Digital projects for the period 2015–2017 include the following:

Website Redesign. No sooner had the Archives created its first content managed website in May 2016 then we recognized its limitations. A Drupal site re-design resulted in version two (2) in November 2017. The site is now conveniently accessible by mobile devices, full website search capability, intuitive navigation and client contact through a query interface.

The Acts of Convention 2015, Digital Archive. The Archives completed an update to the *Acts of Convention, 1976–2015* database in October 2016, adding three hundred and fifteen (315) proofed and

authenticated resolutions from the 2015 General Convention. Analysis of user statistics led to an enhanced database for this edition by retrospectively linking all "A" resolutions to the related *Blue Book Reports* for the years 1982–2006.

Reports to General Convention (The Blue Book) 2015, Digital Archive. The Archives completed data migration, validation and indexing of the *Blue Book* reports from the 2015 edition. The reports are the most frequently downloaded documents as interim bodies prepare for General Convention.

Constitution, Canons and Rules of Order 2015. The Archives assisted the General Convention Office at a time of staff transition to edit the *Journal* minutes in the fall of 2015. This work made it possible to produce a timely edition of the *Constitution and Canons* in January 2016. The Archives completed a retrospective review of all three hundred and four (304) internal references and citations, missing one reference and only two (2) other verifiable errata. The 2015 edition will be the last volume edited by the Archives, which has overseen this work since 2003. Archives staff prepared a manual to guide future editorial work.

The Resolves of Council, 2012–2016, Digital Archive. The curators updated and expanded the *Resolves* database with the addition of three hundred and eighty-six (386) resolutions adopted over the course of fifteen (15) Executive Council meetings. Council resolutions were verified and standardized with Archives metadata. Council-approved policy statements were attached as a new supplement to the 2012–2016 votes.

Venture in Ministry: John Maury Allin Web Exhibit. In May 2016, the Archives published a major exhibit on the 23rd Presiding Bishop. *Venture in Ministry* weaves historical text and rich media into an exploration of Bishop Allin's leadership as he attempted to navigate the Church through arguably its greatest period of institutional change in the 1970s and 1980s. Exhibit curators negotiated the historical role of a conservative, mission-oriented leader who found his best instincts and experience outpaced by events. The project was funded in part by a 2011 grant from the Allin Foundation.

The Senior House: House of Deputies and Women's Ordination Web Exhibit. The Archives published a history of the House including biographies on the presidents and a chapter celebrating the 40th anniversary of the vote to ordain women. The 2016 exhibit explores the history of women in the House of Deputies from their seating at General Convention to the priesthood.

Thy Will Be Spoken: A Ministry of Preaching: John Rowan Claypool Web Exhibit. In 2016 the Archives published an exhibit on the influential career of this preacher, teacher, and spiritual counselor. The exhibit features photographs, writings, and audio recordings from selected sermons. The Archives received The John Claypool Papers from his family in 2011.

The Church Awakens: African Americans and the Struggle for Justice (2017 edition). Technological obsolescence required that the Archives migrate this popular 2008 web exhibit to a more stable web

application. Using an open source system (Omeka), the curators revised the site, added search functions, and updated content throughout. Twenty (20) verified additions were made to the list of Historically Black Parishes and five (5) biographical profiles were created for the leadership gallery.

Ecclesiastical Trial Court Records Digitization Project. The primary audience of the digital archive of case records is Church attorneys, chancellors and canonical advisors who litigate disciplinary cases. It is a backbone resource to the committee revising the standard White and Dykman annotated canons. The Archives developed an electronic library, located "lost" cases and created extensive standards for future work including a rigorous protocol to redact and manage sensitive personal information.

DIGITAL ACQUISITION AND PRESERVATION OF ELECTRONIC RECORDS

Archives staff developed the beginnings of a trusted digital repository to house permanent electronic data stores. Intake workstations have been installed in both the Austin and New York offices and connectivity between the two (2) offices was implemented with the recruitment of new IT staff in NY. Storage servers were configured for a local data repository, which must accommodate a current capacity of approximately seventy-six (76) TB of original and preservation copy data. Open source software programs were customized to create high quality metadata during acquisition, and the code was shared with the wider archiving community with credit to The Episcopal Church Archives.

The curators developed new accessioning standards for electronic records with defined minimum metadata requirements. These new tools were implemented in New York in March 2017 and will be implemented in Austin at the start of 2018. An obstacle for archival management of electronic records has been a recalcitrant headquarters IT department. Management introduced a dramatic change in that area at the end of 2017, which coincided with an Archives decision to adopt an open source software system (Arkivum) to automate the storage, integrity control, and dissemination of our permanent digital records. These developments allow us to make the first optimistic forecast for preserving DFMS historical records since the organization went fully electronic in 2008.

Extranet Data Acquisition Project

In February 2016, the Archives procured a secure transfer of the General Convention Executive Office's Extranet (Rails) application of vital Church records. The Extranet is custom-built software that operates as a low-scale document collection and sharing tool. It has not been coded to standards for data retention or to act as a certified record-keeping system. Core data dictionaries and internal documentation were not created for the system. This essential metadata had to be created retroactively at a cost of several thousand dollars. In addition, multiple applications and third-party code necessary to run the Extranet were outdated, resulting in security issues and an added sense of urgency to establish a fixed operational instance of the program and data. The Archives managed to capture the Extranet with all software dependencies in a virtual machine environment, which will allow experimentation in data migration and processing. Data appraisal began in 2017 to determine permanent content. New system development is scheduled for 2018 to create linked data tables and a simple database container with a new search interface for permanent access to public information.

This application is an exemplar of severely flawed customized software that is not created for long-term data retention and does not follow common information governance standards including Executive Council's 2009 software guidelines.

Digital Preservation of Primary Historical Records

Archival standards of replication, fidelity, and redundancy are used to reproduce records on a case-by-case basis, utilizing a menu of technology options to control for costs. Selection is typically driven by a combination of historical value, user demand, media obsolescence and the fragility or rarity of the original. Each new digital collection is accompanied by a finding aid and metadata. These materials will eventually find their way to internet publication. Preservation digitization of the following archival records occurred in 2015–2017.

Cathedral Films, 1949, illustrated scrapbook and motion picture film, 769 GB
Coalition 14 Records, 1972–1995, audio interviews, 2 GB
Communications Office, Hurricane Katrina video, TEC response, 2015, 525 GB
Constitutions and Canons of The Episcopal Church, 1964–1997, 11 volumes, 47.3 GB
Ecclesiastical Trial Court Records, 1852–2011, 8.19 GB
Forth (Magazine), 1940–1960, 1.2 TB
General Convention Daily, 1958–2009, 88.4 GB
General Convention, video recordings, 2009, 2012, 18 TB
House of Bishops and House of Deputies, audio recordings, 1979, 325 GB
John Maury Allin, audio and video recordings, 1961–1973, 2.85 TB
John Eldridge Hines, 64th General Convention address, audio recording, 1973, 361 MB
John Rowan Claypool IV, 1976–2002, audio and video recordings, 1.4 TB
Liberia Mission, Records of the Order of the Holy Cross, 1920–1961, approximately 75 GB
St. Louis Fellowship of Concerned Churchmen Congress, audio recording, 1977, 1.4 GB

NOTABLE ACQUISITIONS OF HISTORICAL RECORDS

From 2015 to 2017, the Archives acquired approximately two hundred and eighty (280) cubic feet of paper records and 27.72 TB of digital data. Formal accessioning of incoming records is approximately 5.75 years in arrears due to a shortage of staff for processing. An unusual note in this report is the deaccessioning and return of an eighty (80) cubic foot archive held on temporary deposit since 1976 for the Order of the Holy Cross. This was an unplanned one hundred (100) hour time commitment that served to illustrate why archival agencies do not generally accept materials on deposit. The following list is a sample of noteworthy historical acquisitions beyond those records typically received from the DFMS.

(2015)
Papers of the Rev. Edward T. Adkins, re. Selma and Montgomery, 1965, .01 c.f., gift of the family
Records of the American Committee for Kiyosato Educational Experiment Project, ca. 1940–1992, 6 c.f.
Records of the Association for Episcopal Deacons, 2014, 1 c.f.

Records of the Association of Anglican Musicians, 2014–2015, 1 c.f.

Records of Cathedral Films, ca. 1950–1970, 3.5 c.f.

Records of the Committee on Sexual Exploitation (1991-B052a), 1991–1997, 3 c.f.

Records of the Consortium of Endowed Episcopal Parishes, ca. 1982–2009, 2 c.f., gift of James Calloway

Records of the Episcopal Church Building Fund, 1972–2007, 5.5 c.f.

Records of the Episcopal Conference of the Deaf, 2010–2013, 1 c.f.

Papers of Lucy Germany, ca. 1976–2007, 12 c.f., gift of the family

Records of the Girls' Friendly Society, 2009–2014, 1 c.f.

Letters of Frederic Dan Huntington, 1850–1872, .1 c.f., gift of Richard Mammana,

Records and Historical Collections, National Episcopal Historians and Archivists, 1839–2001, 47 c.f.

Publications and Curriculum of Seedlings, Inc., ca. 1978–2011, 5 c.f.

Records of the Standing Commission on Liturgy and Music, ca. 2005–2015, 1.5 c.f.

(2016)

Records of the Association of Diocesan Liturgical Commissions, ca. 1980–2002, 3 c.f.

Records of the Episcopal Church Building Fund, ca. 1889–1998, 34.5 c.f.

Episcopal Church Flag of St. James Episcopal Church, Standing Rock, n.d., donated by John Floberg

Records of Episcopal Women's History Project, Oral history of Olive Mullea, 1989, .1 c.f.,

Research Papers of the Rev. Susanne Watson Epting, ca. 1979–2002, 1 c.f., gift of author

Records of the Secretary of the House of Bishops, 2001–2015, 3 c.f.

Papers of the Rev. Daisuke Kitagawa and Family, 1920–2012, 1 c.f.

Papers of Deaconess Gertrude Mosher, 1869–2004, 1.25 c.f., gift of Sylvia Knight

Records of the National Episcopal Church Women, Secretary/Treasurer, 2009–2012, 1.5 c.f.

Records of President of the House of Deputies: Bonnie Anderson, ca. 2009–2014, 0.3 c.f.

Records of the President of the House of Deputies: the Rev. George Werner, 2000–2006, 2 c.f.

Papers of Dr. Krystyna Sanderson, photos of 9/11 Chaplains-Boots Project, 2001, .1 c.f., gift of artist

Papers of a Tennessee Clergyman, manuscript dairies, 1880s, .1 c.f.

(2017)

Records of Bishops Executive Secretaries Together, 2017–2017, <1 GB

Papers of the Rt. Rev. Edmond Browning, ca. 1970–2015, 8 c.f., gift of the family

Records of Episcopal Church Publishing (*The Witness*), 1990–2005, .5 c.f.

Records of the Episcopal Network for Economic Justice (ENEJ), 2009–2016, 3 c.f.

Records of Episcopal Women's Caucus and Province IV, 1993–2000, 1 c.f.

Records of the Girls' Friendly Society, c. 1928–2014, .35 c.f.

Papers of Dr. Charles R. Lawrence, II, ca. 1939–1985, 16 c.f., gift of the family

Records of Leader Resources, ca. 1997, 1 c.f.

Papers of the Rt. Rev. John Shelby Spong, ca. 1998–2015, 11 c.f., gift of the author

Records of the Standing Liturgical Commission, Prayer Book Revision, 1969–1976, .35 c.f.

Canonical Deposit of Journals and Annual Reports

Only forty (40) dioceses deposited their annual journal in 2015; thirty-eight (38) in 2016, and thirty-two (32) in 2017. Journals are increasingly published in electronic format and some of the deposits noted in the above numbers are received as electronic publications: ten (10) dioceses in 2015, thirteen (13) in 2016, and fifteen (15) in 2017. The Archivist has reported to Executive Council that diocesan journals and annual reports, which are required for an accurate view of the state of the Church, have become far less comprehensive and standard than at any time in the past.

Records Center (NYC) Intake

The Records Management Office manages the noncurrent records of the DFMS. It received a total of six hundred and sixty-nine (669) cubic feet of paper records in the 2015–2017 period. Electronic records amounted to 7.284 TB over the same period. Among the notable accessions were video files from the Episcopal News Service's staff, legacy data from the Government Relations Office in Washington, and a substantial transfer of records from the Presiding Bishop's Office, including Presiding Bishop Katharine Jefferts Schori's electronic records. Most of the DFMS electronic data is unstructured text files and represents records of terminated employees who continued to keep personal stores of data on laptops and remote offices. A number of legal holds limited the destruction of obsolete records in the three (3) year period to one hundred and sixty-two (162) c.f. versus the typical four hundred and seventy-five (475) c.f.

ACCESS TO PROCESSED HOLDINGS

As the horizon closes in on the physical relocation of the holdings, staff concentrated attention on a continuing audit of holdings and organizing a number of important or large collections of material. Archivists completed review of legacy finding aids (created since 1960s) to standardize data and create electronic record copies for all three hundred and forty-four (344) fully processed record groups. The Finding Aids Reconciliation Project involved a retrospective conversion of paper inventories, the repair of poor descriptive information and updates from accrued notations over time. Restricted and confidential collections were reviewed and standard access language was applied to each record group to alert the reference staff. Alongside this project, the curators teamed up to create one hundred and seventy-five (175) new holdings profiles for the historical collections described in the browsable section of the website.

In 2016 and 2017, the staff prepared full archival finding aids for 141.3 cubic feet and 10.55 GB of historical records. Inventory-level guides were produced for an additional one hundred and sixty-one (161) cubic feet, resulting in an overall total of three hundred and five (305) cubic feet of organized records. This extraordinary quantity of arrangement and description occurred during a staff vacancy in the collection management position, which speaks to a team of talented part-time archival assistants. Finding aids were created for the following holdings:

Archives Prayer Book and Liturgy Collection, 1695–2011, 22.5 c.f.
Records of Cathedral Films, 1938–1999, 40 c.f.

Papers of the Rev. John Rowan Claypool IV, 1947–2011, 26 c.f.

Records of the DFMS, Specialized Ministries and Social Welfare Office, 1964–1982, 2 c.f.

Records of the DFMS, Stewardship Office, 1960–1989, 3 c.f.

Records of the Ecclesiastical Trial Courts, 12 cases, 1852–2011, 9.8 c.f. and 8.19 GB.

Episcopal Church Publications Collection, c. 1986–2004, 2 c.f.

Papers of the Rev. William Baillie Green, 1952–2011, 31 c.f. and 2.36 GB

Papers of the Rt. Rev. Everett Holland Jones, 1925–1984, 13.25 c.f.

Papers of the Rev. James Milton Richardson, 1934–1965, 1 c.f.

Records of the Rev. Malcolm Riker, 1963–1995, 8 c.f.

Records of the Standing Commission on Church Music, 1940–1981, 1 c.f.

Papers of the Rt. Rev. Albert and Elizabeth Swift, 1878–2002, 1.75 c.f.

Records of the United Thank Offering, 1971–1988, 2 c.f.

Papers of William White, 1764–1835, and Family, 1643–1939, 2.5 c.f. (a calendared collection)

The Archives obtained several fine book and pamphlet collections to augment its special library collection. These included gifts of Episcopal works deaccessioned by Sewanee University's duPont Library and Church Publishing's Morehouse imprint library. As Episcopal libraries winnow their collections to emphasize current works, the Archives is invited to select historical publications on polity, historiography, biography and provinces of the Anglican Communion. Approximately eight hundred and twenty (820) volumes were acquired in the three (3) year reporting period.

DFMS RECORDS ADMINISTRATION

The Archives' Records Management Office at the New York headquarters responded to three hundred and forty (340) office consultation requests in 2015, three hundred and forty-six (346) consultations in 2016 and three hundred and sixty-five (365) in 2017. These included assistance with electronic records, filing systems, data retention and transfer, and general information management. The office has been routinely integrated in new staff orientations and data transfer at the point of employee terminations. The New York-based archivist conducted three (3) major office surveys for Government Relations, Federal Ministries Chaplaincy and the flagship Miami Office of Episcopal Migration Ministries, which was closed on short notice. Other notable DFMS projects include:

- Content management of the online Employee Resources and Information Center
- Office 365 file system development for the Presiding Bishop's office
- Consolidated DFMS grants database as an online application
- Payroll data migration to a new external vendor
- Episcopal News Service data conversion, capture and transfer
- Appraisal of Basecamp software applications
- Conscientious Objector Registration Standards for the Young Adult/Campus Ministries Office
- Data management, retention and privacy for Episcopal Migration Ministries
- Data privacy and retention for event registration for the Youth Ministries Office

Corporate Information Loss and Risk Assessment

The central offices operate in a decentralized information ecology with no reliable consensus on information governance rules. The Archives is required to maintain a high-level map of the Society's distributed e-records, which are held in cloud-computing applications, a variety of personal email accounts, and vendor business software. The map is woefully incomplete due to the lack of inter-departmental data coordination. Especially concerning is data loss and confidential data storage on local computer drives (remote offices, laptops). Lack of software training leaves employees looking for work-arounds outside the DFMS systems. Such practices have been inimical to both archival retention and data destruction protocols for sensitive electronic records. We are hopeful in the next triennium to address these concerns at an organizational level with the recent appointment of a new COO and changes in IT staffing.

OUTREACH

The Archives responded to two hundred and thirty (230) requests for individual consultations from parishes, dioceses, and Episcopal Church organizations between 2015 and 2017. The consultations relate to a variety of questions on the management, retention, and preservation of organizational records. Managing electronic records is a frequent issue raised by stakeholders affecting privacy, digitization standards, copyright, and third party reproduction. The Archives used Facebook for social medial outreach. The three (3) year period led to a marginal increase in fans, or "likes," from 1,493 (2015) to 2,530 (2017). An effort was made to create posts that showcase the Archives' unique holdings as they relate to events in the Church and community, including several series to highlight General Convention themes, Refugee Day and the Episcopal Church's history of refugee aid, the House of Deputies, and women's ordination anniversary.

A SUSTAINABLE BUILDING PROJECT

A third and hopefully final round of development planning for an archives building in Austin emerged with vitality in this reporting period and represents a considerable investment of staff time. Beginning in 2015, Consultant the Rev. Lang Lowery of Verta Group was engaged to examine feasibility of a development plan to attract a high-end investment partner or purchaser of the DFMS-owned lot in Austin. The lot was originally purchased in 2009 on a line of credit loan of $9.5 million. In a May 2015 meeting, the DFMS COO stated his opposition to fund-raising opportunities for the additional expenses associated with a new building and invoked the Executive Council's permission to sell the land if values warranted that outcome. A marketing proposal was circulated in September and received positive developer response into January 2016. In this same month, a change in the DFMS management opened the way for Executive Council's re-commitment to the Project, and in March, it voted to pursue the Austin building and a fund-raising plan in preference to a sale. The Canonical Archivist became actively involved with the consultant in overseeing the project and fund raising on behalf of the DFMS and the Archives Board.

With Executive Council's and Presiding Bishop Curry's support, the project has moved steadily in a positive direction. By October 2016, a revised building program was prepared with the architects of

choice (Studio 8 of Austin) within a revised footprint of approximately sixty thousand (60,000) square feet of net useable space. In February 2017, the DFMS signed a purchase and sales agreement with the selected Austin-based developer. Since then, the DFMS has worked with the developer and the City of Austin to obtain crucial land use accommodations to offset the known constraints of a public alleyway and a view corridor that bisect the lot. A positive recommendation on these allowances was made by city officials in December 2017, setting the stage for finalizing all financing and common area agreements in 2018. Parking lot revenue continues to support the DFMS's share of these preliminary operational costs. The consultant has been diligent to protect the Church's interest by stipulating a withdrawal of the land sale (now valued at about $28 mil) if DFMS stipulated conditions are not met before the end of 2018.

Fund Raising for Development

The DFMS will be relieved of all construction costs by trading the land investment made a decade ago. Securing the building for the future is critical, however, to prevent an impact on future Church budgets. Beginning in October 2016, a significant Archives staff commitment was made to fund raising with an endowment goal of $12–15 million for future care and enhanced programming amenities. Working with Director of Development Tara Holley, the Archivist reworked the case statement, developed marketing materials, met with project staff, prepared prototype renderings with the architects, and met with many dozens of contacts and potential donors while developing the first useful donor data base for the DFMS. The professionalism of the current Development Office staff and dedication to this Executive Council priority is unparalleled compared to any previous DFMS effort. The campaign schedule calls for us to broaden our appeal beyond the silent phase of major gift solicitation to a nation-wide appeal in the second half of 2018. From 2015 to 2017, the Archives acquired approximately two hundred and eighty (280) cubic feet of paper records and 27.72 TB of digital data.

ACKNOWLEDGMENTS

The Archives curatorial and technical support team accomplished an enormous amount of work in this triennial period, from assisting with unanticipated post-General Convention publications, to maintaining a high level of research for Church bodies, to gearing up archival operations in preparation for a possible move. Special mention is owed to Administrative Deputy David Hales for his diligent and tireless assistance in regular tasks and the supplementary tasks pertaining to the building plans and fund raising. Our curators have excelled in meeting the challenge of electronic records archiving and preservation: Corrinne Collett who directs the Records Management Office in New York and Whitney Hughes who, as Digital Archivist, directs our digital content management. In April 2016, we added a new staff member in Chris Paton who dedicated herself to a year of learning as Archivist for Research and Institutional Services. After eight (8) years of superior service as our Collections Manager, Lauren Kata took her career in new directions in March 2017. The open position is due to be filled in January 2018.

We are able to accomplish an ambitious set of intentional and unplanned projects because the regular curatorial staff can reliably depend on expert technical support from our consultants, part-time project archivists and interning students who add fresh knowledge and skills to our increasingly specialized professional duties. We are grateful to the following archives assistants: Jamila Davey, Keely Drummond, Amy FitzGerald, Rachael Gilg, Patrick Goetz, Delia Gray, Scott Jordan, Nikole Koelhert, Ellie Miller, Kate Orazem, Angela Perkins, Sarah Sauri, Win Scarlett, and Drew Schmitz.

This triennial reporting period was a particularly challenging one for the Archives Board as their authority was often challenged and their leadership potential stymied. In some sense this derives from a failure to appreciate the distinctly different kind of ministry that the Archives brings to The Episcopal Church. It is as much a cultural institution of the Church as it is an administrative arm and its value lies in its credibility as an independent source of historical interpretation and information management. As executive director of the Archives, this writer depends enormously on the Board's counsel in setting the mission and direction of the Archives. For the gifts of the Holy Spirit, which they and our other advisors embody, we are profoundly thankful.

Mark J. Duffy
Canonical Archivist
December 15, 2017

THE CHURCH PENSION FUND

Membership

Barbara Creed, *Chair*	El Camino Real, VIII	2018
The Rev. Dr. Timothy Mitchell, *Vice-Chair*	Kentucky, IV	2021
Ms. Sandra Swan, *Vice-Chair*	East Carolina, IV	2021
Ms. Martha Alexander	North Carolina, IV	2021
The Rev. Thomas Brown	Massachusetts, I	2021
The Rt. Rev. Diane M. Jardine Bruce	Los Angeles, VIII	2018
Mr. Vincent Currie Jr.	Central Gulf Coast, IV	2018
The Rt. Rev. Clifton Daniel	New York, II	2018
Mr. Gordon Fowler	Pennsylvania, III	2018
Dr. Delbert Glover	Rhode Island, I	2018
Mr. Ryan Kusumoto	Hawaii, VIII	2018
The Very Rev. Tracey Lind	Ohio, V	2021
Mr. Kevin Lindahl	Colorado, VI	2021
Canon Kathryn McCormick	Mississippi, IV	2018
Ms. Sandra McPhee	Chicago, V	2021
Ms. Margaret Niles	Olympia, VIII	2021
Mr. Sleiman (Solomon) Owayda	Massachusetts, I	2018
Ms. Diane Pollard	New York, II	2018
The Rt. Rev. Brian N. Prior	Minnesota, VI	2021
The Rt. Rev. Gregory Rickel	Olympia, VIII	2021
Canon Rosalie Simmonds Ballentine	the Virgin Islands, II	2018
Ms. Anne Vickers	Southwest Florida, IV	2021
The Rev. Canon Sandye Wilson	Newark, II	2021
Ms. Mary Kate Wold	New York, II	
Mr. Cecil Wray	New York, II	2018

Summary of Work

OVERVIEW — ONE Hundred (100) YEARS OF SERVICE TO THE EPISCOPAL CHURCH

The Church Pension Fund (CPF) 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, and Church Publishing Incorporated (collectively, the Church Pension Group or CPG).

CPF's relationship with the Episcopal Church (the Church) began over a century ago. The large population of clergy with inadequate resources to support a dignified retirement had long been a concern of the

Church. In 1910, Bishop William Lawrence advocated for, and the General Convention approved, the creation of the Joint Commission on the Support of Clergy to study the feasibility of a mandatory pension system for Episcopal clergy.

In response to the recommendation of the commission, the General Convention of 1913 authorized the commission members to create a separate corporation, The Church Pension Fund, to take the necessary steps to establish a clergy pension fund. The General Convention of 1916 also enacted a canon (now Title I, Canon 8) of the Constitution and Canons of the Church to give CPF the authority to administer pensions and other benefits for Episcopal clergy and to collect assessments to fund such benefits.

After securing initial funding, CPF opened its doors in 1917 and sent out its first pension check on March 1 of that year. Thus began CPF's mission of serving the Church by providing retirement and other employee benefits to its clergy, and eventually to lay employees.

CPG is observing its 100th anniversary from March 1, 2017, through March 1, 2018. One hundred years on, CPG's vision remains the same: to provide its clients with the highest possible level of financial security in retirement that is consistent with exemplary financial stewardship on CPF's part and with the evolving needs of the Church. CPF's dedication to its vision has enabled its work and its close collaboration with the Church over the past century.

Today, CPG has the following three lines of business: employee benefits, property and casualty insurance, and publishing. Each year, CPG hosts hundreds of educational programs, answers more than 75,000 client calls, visits over 3,000 congregations and other institutions, and welcomes 320,000 visits to its website. CPG is a complex business with three core values that guide everything it does: professionalism, compassion, and trustworthiness.

Typical of most pension funds, the legal and governance structure of CPF is designed to protect CPF's assets for the benefit of its participants. CPF trustees are elected by General Convention, but once elected, they are bound first and foremost by a legal, fiduciary duty to CPF and, indirectly, its participants.

This Blue Book Report reviews the work of CPG during the past triennium and describes major areas of focus during that time.

CPF BOARD AND GOVERNANCE

Governance of CPF is provided by a twenty-five (25) member board of trustees that consists of twenty-four (24) trustees elected by General Convention and the CPF Chief Executive Officer and President.

The Work of the Church Pension Fund [CPF] Board

The CPF Board makes major policy decisions affecting investment strategy, pensions, and other benefits and services. It oversees the strategic direction of a broad and varied consortium of businesses. The CPF Board must address complex issues faced by the organization, both recognizing the need for compassion and flexibility and ensuring financial accountability. As a result, the trustees have the challenge of balancing sometimes-conflicting social and fiduciary responsibilities.

The CPF Board is enriched by the counsel 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 complexity of CPG's business places 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 in 2018, selecting from the slate of nominees presented by the Joint Standing Committee on Nominations.

Eight trustees — Canon Rosalie Simmonds Ballentine, Esq., the Rt. Rev. Dr. Diane M. Jardine Bruce, the Rt. Rev. Clifton Daniel III, Gordon B. Fowler, Jr., Delbert C. Glover, Ph.D., Ryan K. Kusumoto, Canon Kathryn Weathersby McCormick, and Solomon S. Owayda — are eligible and have agreed to stand for re-election. The following four trustees are retiring from the CPF Board in 2018, having faithfully served the two consecutive six-year terms allowed by the Canons of the Episcopal Church: Barbara B. Creed, Esq., Vincent C. Currie, Jr., Diane B. Pollard, and Cecil Wray, Esq. The remaining 13 trustees will continue to serve.

REVIEW OF THE PAST TRIENNIUM

Financial Strength of CPF

The single most important job of the CPF Board is monitoring the financial strength of CPF, including the critical component of investment performance. Even though CPG collects assessments for each individual enrolled in one of its defined benefit pension plans, the collected assessments do not cover the cost of benefits under its plans. For example, in the fiscal year ended March 31, 2017, CPF received approximately $97 million in assessments and paid out nearly $377 million in pension and related benefits to Episcopal clergy and lay employees. Strong, consistent investment performance is needed to fill the gap between the amount of assessments collected and the amount of benefits paid every year. CPF's investment performance is critical to fulfilling its mission, which is why CPF places so much emphasis on active management and careful decision-making.

CPF invests primarily in funds run by outside managers, and it currently has over 200 such managers across stocks, bonds, and other asset classes. Through its managers, CPF is invested in almost five hundred (500) different funds, which in turn hold a wide array of individual investments. These managers and funds bring unique insights and approaches to identifying attractive investments that CPF believes will generate desired long-term returns. CPF relies on its managers to select the individual stocks, bonds, and other

assets that comprise their portfolios. The exception is a relatively small TIPS (Treasury Inflation Protected Securities) portfolio that CPF manages directly. The work of CPF's internal investment team includes sourcing, recruiting, and hiring its outside managers, who are some of the most highly regarded managers from around the world in each asset class, and providing ongoing oversight and evaluation of their performance.

CPF remains in solid financial condition due to both good investment results and strong financial stewardship, which includes stress-testing its assets to determine whether CPF is appropriately funded today to have a high level of confidence that it will be able to meet future needs. Stress- tests of the Clergy Pension Plan over the past few years have shown that CPF has an appropriate level of assets to honor its obligations over the upcoming decades, but Clergy Pension Plan assets are in a cautionary zone. This means there are not sufficient assets in the Clergy Pension Plan (i) to make any significant enhancements of benefits or (ii) to make any significant reduction in the level of assessments without revisiting the level of benefits that it currently offers. In the past triennium, the CPF Board did approve discretionary cost of living adjustments (COLAs) to retired beneficiaries of the Clergy Pension Plan in every year that the Social Security Administration offered a COLA for its beneficiaries. COLAs were not granted to retired beneficiaries of The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) because the CPF Board determined that granting a COLA would put too much of a strain on the financial strength of the Lay DB Plan. See www.cpg.org/COLA for details.

As of September 30, 2017, CPF assets stood at $13.2 billion (unaudited). Assets Available for Benefits in the Clergy Pension Plan stood at $12.3 billion (unaudited) and Assets Available for Benefits in the Lay DB Plan stood at $199.6 million (unaudited). These numbers are improvements over previous years.

Results for the fiscal year ended March 31, 2018, will be available at the General Convention in July and will also appear in the 2018 Church Pension Group Annual Report, which will be published online at www.cpg.org.

New Chief Operating Officer
In 2016, Francis P. Armstrong succeeded Jim W. Morrison as chief operating officer of CPG. Armstrong has a long history with the organization, having served as CPG's Chief Actuary and Senior Vice President of Benefits Policy prior to Morrison's retirement. Even before joining CPG, Armstrong had a connection to the organization. His past experience includes serving as a managing principal and practice leader for the Eastern Region for Hewitt Associates' Health Management Practice, where CPG was his client.

I. Employee Benefits
CPG provides a broad array of employee benefits and related services to the Church. When appropriate and financially feasible, CPG considers changes to benefits policy to respond to changing needs of the Church.

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

A. Defined Benefit (DB) Plans

The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan) is a defined benefit plan providing retirement and death benefits to eligible clergy of the Episcopal Church. It currently provides pension and related benefits for more than eighteen thousand (18,000) active and retired clergy and eligible surviving spouses or other named beneficiaries. Clergy Pension Plan benefits include monthly pension payments, a Christmas benefit, a resettlement benefit, and a pre-retirement survivor's benefit. Additional benefits are offered to eligible participants in the Clergy Pension Plan through separate plans, including short- and long-term disability benefits, life insurance, child benefits, and a discretionary subsidy toward the cost of a Medical Trust Medicare Supplement Health Plan.

After a four-year study of clergy deployment and demographic trends, CPG proposed a comprehensive set of changes to the Clergy Pension Plan and related plans to drive greater flexibility, consistency, and simplicity. The revisions were vetted in conversations with more than one thousand five hundred (1,500) individuals and were approved by the CPF Board in December 2016. Please see CPF's response to General Convention Resolution 2015-A177 in this Blue Book Report for details.

The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan) is a defined benefit pension plan that was established in 1980. Lay DB currently provides benefit coverage for approximately three thousand nine hundred and five (3,905) active, retired, and terminated, but vested, participants. Lay DB Plan benefits include monthly pension payments and a disability retirement benefit for eligible participants. Death benefits are also included for eligible participants and are paid out of The Episcopal Church Lay Employee's Death Benefit Plan. 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 fifty-five (55) but prior to retirement. The required assessment of nine (9) percent in the Lay DB Plan is lower than the required assessment of eighteen (18) percent in the Clergy Pension Plan. As a result of this difference, the benefits provided under the Lay DB Plan are not equal to those provided under the Clergy Pension Plan.

International Plans — CPF administers a group of unique defined benefit pension plans on behalf of current and certain former dioceses of the Episcopal Church that are located outside the fifty (50) United States.

B. Defined Contribution (DC) Plans

CPF offers the following two defined contributions plans:

The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay DC Plan) provides individual retirement savings accounts to approximately sixteen thousand (16,000) active, retired, and terminated, but vested, participants. Fidelity Investments is the record keeper of the Lay DC Plan and 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 meant to supplement the retirement benefits available to clergy and eligible lay employees who are

enrolled in one of CPF's defined benefit pension plans using their own tax-deferred contributions. Participants have their own accounts and direct the way their money is invested. As with 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.

Changes to CPF's Defined Contribution Plans — In the past triennium, as assets in its defined contribution plans grew, CPF was able to reduce participant investment fees by moving to lower-cost Fidelity funds that are only available to larger defined contribution plans. CPF replaced the Domini Fund with the DFA U.S. Sustainability Core 1 Portfolio Fund, a high-performing socially responsible fund with lower fees. Historically, participant selection of the socially responsible options available via the Fidelity platform has been low. A 2016 survey administered by CPF's Research and Data team revealed that most lay employee and clergy investors prioritize strong returns over positive social impact when making investment choices. Still, CPF decided to make another socially responsible investment option available to individuals who are interested in investing their own savings while considering social issues.

The changes to CPF's defined contribution offerings include replacing the previous money market fund with the lower-cost Fidelity Investments Money Market Government Portfolio - Institutional Class fund, and replacing the previous 500 Index Fund with the lower-cost Fidelity 500 Index Fund - Institutional Premium Class. The changes apply equally to the Lay DC and RSVP plans.

Update on the Lay Pension System — The Lay Pension System, which was established by General Convention Resolution 2009-A138, and later amended by General Convention Resolution 2012-C042, requires dioceses, parishes, and other Church institutions subject to the authority of the Church to enroll their lay employees scheduled to work a minimum of one thousand (1,000) hours annually in the Lay DB Plan, the Lay DC Plan, or certain pre-existing pension plans. As mandated by General Convention, the required contribution to the Lay DB Plan is nine (9) percent of the employee's compensation, and the required contribution to the Lay DC Plan is five (5) percent of the employee's compensation, with an institutional match of at least four (4) percent of the employee's contributions to the Lay DC Plan.

Participation in the Lay Pension System has been strong, and at this point CPG estimates that approximately ninety (90) percent of employers with lay employees that are required to participate are complying. Most employers have chosen to enroll their eligible lay employees in the Lay DC Plan; only about 11.6% of eligible lay employees participate in the Lay DB Plan. As a reminder, CPF has no enforcement power with respect to the Lay Pension System but has pursued a rigorous ongoing campaign since 2009 to educate Episcopal employers with respect to the requirements of the Lay Pension System and to enroll their eligible lay employees in its plans.

For a variety of reasons, retirement benefits for clergy and lay employees are not equal. To achieve parity, the Church could mandate that all lay employees participate in the Lay DB Plan (rather than only in the Lay DC Plan), and the assessment rate for lay employees would have to be raised from the current nine (9) percent to eighteen (18) percent. Even then, it would take some years for the assets of the Lay DB Plan to grow sufficiently to afford the full menu of benefits offered by the Clergy Pension Plan.

In addition to retirement benefits, CPG provides other benefits and programs, described below.

C. Healthcare

The Episcopal Church Medical Trust (Medical Trust) is the sponsor of The Episcopal Church Clergy and Employees' Benefit Trust, a Voluntary Employees' Beneficiary Association (VEBA) established in 1978. The Medical Trust offers meaningful health benefits choices that are designed to meet the needs of clergy, lay employees, and retirees of the Church and their eligible dependents. Working with world-class health networks like Cigna, Anthem BlueCross and BlueShield, and Kaiser Permanente (and UnitedHealthcare for the Medical Supplement Health Plans), the Medical Trust offers nineteen (19) different plan designs that include preferred provider and consumer-directed health plans across all four Affordable Care Act [ACA] required tiers of plan coverage (i.e., platinum, gold, silver, and bronze). These plans all include mental health, vision, employee assistance program, and health advocacy benefits at no additional charge. Dental care plans are also available. The Medical Trust relies on multiple carriers to serve one hundred (100) domestic dioceses and forty-three (43) other institutions in the United States. The Medical Trust offers multiple carriers to ensure adequate network coverage.

The Medical Trust is the Church's selected health benefits provider under the Denominational Health Plan (DHP). The DHP, which was created by General Convention Resolution 2009-A177, and later reaffirmed and amended by General Convention Resolution 2012-B026, has two (2) distinct and independent goals: to achieve cost containment for the Church in light of continually rising healthcare costs, and to provide equal access to and parity of funding for healthcare benefits for eligible clergy and lay employees in the domestic dioceses.

In addressing the cost containment goals of the DHP, the Medical Trust has focused on three primary objectives:

- Slower Increases in Cost: Slowing the increase in healthcare costs for the Church compared to the increase in such costs outside the DHP.

- Local Price Competitiveness: Ensuring that the actual cost of healthcare plans offered by the DHP are competitive with the cost of comparable plans offered in each local market.

- Reduced Disparity Among Dioceses: Reducing the disparity in the cost of healthcare plans offered by the DHP from one diocese to another while still remaining competitive in the local market of each diocese.

Slower Increases in Cost — From 2010 to 2014, U.S. employers' health insurance premiums increased an average of five (5) percent to eleven (11) percent annually, while the Medical Trust's increases averaged four (4) percent to six (6) percent for the same years. In 2015 and 2016, the ACA exchanges increases averaged from seven (7) percent to ten (10) percent, while the Medical Trust's increases averaged from five (5) percent to six (6) percent. For the 2017 plan year, the Medical Trust was able to deliver a single-digit average rate increase of six (6) percent, a very favorable result as compared to rate increases that averaged twenty-four (24) percent on the ACA exchanges. The Medical Trust expects this trend to continue

in 2018 as early signs point to high double-digit increases again on the ACA exchanges compared to the Medical Trust's 2018 single-digit average rate increase of six (6) percent.

Local Price Competitiveness — For the Denominational Health Plan [DHP] to be successful, the Medical Trust must be able to slow the growth in healthcare costs for the Church and offer plans to the Church that are priced competitively compared to alternative options. Again, the Medical Trust has been able to produce favorable results.

In 2016, the average cost of healthcare plans under the DHP was approximately four (4) percent less than the average cost of comparable plans on the ACA exchanges. That position improved in 2017, with the Medical Trust average cost at nineteen (19) percent below the average cost of comparable plans on the ACA exchanges, and CPG expects that advantage to increase materially again in 2018. On a region-by-region basis, Medical Trust rates in 2017 are more competitive than the comparable plans on the ACA exchanges in eighty-nine (89) percent of dioceses, and CPG expects that number to grow to ninety-eight (98) percent in 2018. With respect to the remaining two (2) dioceses, the Medical Trust expects rates in 2018 to be no more than seven (7) percent above the average comparable exchange rates on the ACA exchanges. The Medical Trust is particularly pleased about this result given that its plans cover a population that, on average, is older than the populations that participate on the healthcare exchanges and the plans offered provide broader networks — not to mention the fact that the Medical Trust offers additional benefits not offered on the exchange, including the employee assistance program, Vision, and Health Advocate.

Reduced Disparity Among Dioceses — As has been evident from the pricing on the various ACA state exchanges, the cost of healthcare varies greatly from one area of the country to another. Notwithstanding that reality, the Medical Trust has been responding to concerns with cost differences raised by past General Conventions by working diligently to reduce the disparity in healthcare costs from one (1) diocese to another.

For 2017, seventy-five (75) percent of diocesan rates for the same plans are clustered near the average rate offered by the Medical Trust — that is, they are within a band of ten (10) percent below to five (5) percent above the average rate. The remaining twenty-five (25) percent of the dioceses have rates that are ten (10) percent (or more) below the average Medical Trust rate for the same plans. Offering lower rates in those dioceses has been necessary for the DHP to remain competitive with comparable rates on the ACA exchanges. The Medical Trust expects similar results in 2018.

Ongoing Efforts — The Medical Trust remains committed to continuing to contain cost increases while providing comprehensive healthcare benefits and compassionate service. In order to provide the lowest possible premium rates while maintaining competitive levels of coverage for its members, the Medical Trust continues to do the following:

- Evaluate its plan designs for quality and value.
- Reduce the number of plans in each category (i.e., platinum, gold, silver, and bronze) to consolidate purchasing power with fewer vendors while still maintaining meaningful participant choice and robust access to healthcare providers.

- Leverage purchasing power in negotiations with key vendors to achieve maximum savings on plan administration fees.

- Participate in the Express Scripts group purchasing coalition for pharmacy benefits (contract negotiations in 2016 reduced future prescription drug costs over three (3) years by approximately $37 million).

- Remain self-insured (i.e., the Medical Trust bears the financial risk of medical and prescription drug claims), with limited and judicious use of reinsurance for only the very largest claims.

- Manage its internal operations to drive continued cost efficiencies.

- Explore additional cost-saving opportunities that develop in the emerging healthcare marketplace.

CPF administers the Denominational Health Plan [DHP] to be of service to the Church by providing a superior aggregate level of healthcare benefits, both in cost and quality, then is otherwise readily available in the market. CPF notes, however, that providing healthcare coverage to the Church is ancillary to its principal focus, which is providing secure retirements for its pension plan participants. CPF remains optimistic that it can continue to be successful in its objectives as long as participation in the DHP remains mandatory. However, if the Medical Trust were no longer able to provide a better overall solution to the Church than it could access elsewhere, CPG management would readily work with the Church to help it consider and understand other options.

Regarding parity of funding, General Convention Resolution 2009-A177, which was later reaffirmed and amended by General Convention Resolution 2012-B026, required each diocese to set a minimum healthcare cost-sharing policy that would apply equally to eligible clergy and lay employees by December 31, 2015. Based on information available to CPG in 2016, seventy-five (75) percent of dioceses have an approved cost-sharing policy in place that applies equally to clergy and lay employees. The Medical Trust continues to work closely with the remaining dioceses to assist them in establishing the minimum required employer cost-sharing policy for their clergy and lay employees.

It is important to note that the Medical Trust has no authority by which to enforce General Convention's cost-sharing policy. Rather, it must rely on the dioceses to ensure that parity in medical coverage between clergy and lay employees ultimately is achieved.

For more information, please read the 2017 DHP Annual Report, which is available on CPG's website at www.cpg.org/dhp-annual-report.

The Fund for Medical Assistance — CPF continues to support clients in the non-domestic dioceses through the Fund for Medical Assistance, which offers financial assistance to eligible clergy, lay employees, and dependents facing healthcare expenses that are not otherwise covered by public or private insurance programs. CPF granted $27,400 in 2015, $27,005 in 2016, and $35,900 in 2017 (through August 2017) out of the Fund for Medical Assistance, and has continued to communicate the availability of the program.

D. The Fund for Special Assistance

The Fund for Special Assistance provides grants to retired clergy, surviving spouses, and dependents receiving benefits and experiencing a specific, extraordinary financial challenge. CPF granted $68,450 in 2015, $112,750 in 2016, and $56,400 through August 2017 from the Fund for Special Assistance, and has continued to communicate the availability of the program.

E. Life Insurance

Church Life Insurance Corporation (Church Life) has provided 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 ninety (90) percent 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 a 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.

II. Property and Casualty Products

The Church Insurance Companies (CIC) consist of several affiliate entities that offer churches, dioceses, and institutions property and liability coverage as well as risk management tools and strategies. Together they have been providing property and casualty insurance and related services to Episcopal churches and institutions since 1929, including access to the insurance products of outside product partners (e.g., Liberty Mutual for workers' compensation insurance).

In 2017, William (Bill) F. Murray succeeded Dale Roderick Webster as Senior Vice President and General Manager of CIC. Murray joined CIC with more than thirty (30) years of insurance industry experience, including Chief Underwriting Officer, Casualty/Public Risk at Houston Casualty Company, and sixteen (16) years at General Star Insurance Company, now owned by Berkshire Hathaway. Murray is passionate about CIC's mission to provide competitive property and casualty coverage to Episcopal institutions in a financially sustainable way.

CIC representatives visit over three thousand (3,000) client locations each year and publish a popular risk management e-newsletter, *The Good Steward*. Two (2) CIC affiliates provide insurance to eligible institutions using a captive insurance structure that is more cost-effective and flexible than other alternatives. All claims, billing, and underwriting activities are performed in Bennington, Vermont, where CIC is headquartered. While Episcopal churches and other institutions are able to purchase their property and casualty insurance from any insurer they choose, ninety-five (95) percent of churches buy it from CIC.

From the beginning, CIC has provided a vital service to the institutions that have enrolled in its programs. CIC continues to explore options to improve its financial sustainability while continuing to provide comprehensive coverage so it can continue being of service in the century ahead.

III. Publishing

Church Publishing Incorporated (CPI), which was founded in 1918 as the Church Hymnal Corporation, is the official publisher of worship materials and resources for the Episcopal Church and is a multifaceted publisher and supplier to the broader ecumenical marketplace. CPI produces about fifty (50) new books and resources each year and manages a portfolio of more than one thousand five hundred (1,500) active titles, many sold worldwide.

In 2017, Mark Dazzo succeeded Davis Perkins as Senior Vice President and Publisher at CPI. Prior to becoming publisher, Dazzo served as chief marketing officer for the firm. He has a deep understanding of the Church and of the publishing industry.

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

The Church Pension Fund and Affiliated Companies
Services and Clients

The Church Pension Fund

Clergy DB Pension Plan	18,484
Lay DB Plan	3,905
Lay DC Plan	16,012
RSVP Plan	5,045

The Episcopal Church Medical Trust
Clergy

Not-Yet-Retired	3,883	
Retired and Surviving Spouses	5,049	
Lay Employees		
Not-Yet-Retired	9,052	34,408
Retired and Surviving Spouses	2,416	
Family Members		
Not-Yet-Retired	11,595	
Retired and Surviving Spouses	2,413	

Church Life Insurance Corporation

Group Life Insurance	23,515
Individual Life Insurance	1,310
Annuities	4,840

The Church Insurance Companies
The number/percentage of Episcopal churches and dioceses that purchase their property and casualty insurance from CICVT or CICNY

Episcopal Churches	6,200 / (95%)
Episcopal Dioceses	96 / (96%)

Church Publishing Incorporated

Books in Print	961
Church Supplies	538
Christian Education Resources	345
eBooks	705
eProducts	42

As of October 31, 2017

RESPONSES TO GENERAL CONVENTION

I. Revise Benefits for Alternative Forms of Ministry Service (Resolution 2015-A177)

Resolution 2015-A177 directed the Church Pension Fund to continue to work actively toward revision in how benefits may possibly be determined, in order to be responsive to the changing nature of Church leadership in order to serve the leadership of this renewed Church God is calling us to be. Particularly, alternatives are sought for bi-vocational, non-stipendiary, interrupted continuity of service, and those serving in interim ministries. The resolution required CPF to report its findings to the Executive Council.

After several years of study and consultation around the Church, CPG finalized revisions to the Clergy Pension Plan and related plans. Over four (4) years ago CPG commenced a comprehensive series of listening events around the Church hosted by CPG management and trustees. These listening events included focus groups with clergy in different demographic groups, such as second-career, part-time, bi-vocational, non-stipendiary, recently ordained and recently retired clergy. The events also included larger regional meetings and webinars involving benefits administrators and lay leaders. With the benefit of insights from these meetings as well as from its day-to-day presence around the Church, the CPF Board affirmed that the objectives of the Clergy Pension Plan revision should be three (3) fold: (i) increased flexibility to reflect evolving models of ministry; (ii) consistency to ensure that all clergy are treated equitably; and (iii) simplicity to ensure that the benefits under the plan are more easily communicated and administered.

Once CPG began the work of actually designing the new pension plan to meet the foregoing objectives, it adopted an iterative approach of testing ideas with groups of clergy, bishops, administrators and lay leaders, refining ideas to reflect the feedback and then repeating that testing. With this process, in approximately fifteen (15) months CPG was able to obtain direct input from over one thousand five hundred (1,500) individuals around the Church. Pursuant to the resolution, Mary Kate Wold, CEO and President of CPF, met with Executive Council on February 7, 2017, to describe proposed changes to the Clergy Pension Plan.

Bi-vocational and Part-Time Clergy — A number of revisions to the Clergy Pension Plan are intended to benefit part-time clergy. Examples include the following: (i) revisions to eligibility requirements that make it easier for clergy at lower compensation levels to become participants in the plan; (ii) revisions that make it easier for part-time and lower-paid clergy to earn a full year of credited service, as opposed to fractional years, for twelve (12) months of work; (iii) revisions that create more flexibility for making personal payments into the plan during breaks in service; (iv) removal of the "consecutive year" requirement for determining the Highest Average Compensation, thereby making it easier for clergy to risk leaving higher-paid service to take lower-paying positions; (v) increase in the life insurance benefit from four (4) times Highest Average Compensation to six (6) times Highest Average Compensation; and (vi) revisions that increase the minimum pensions for many clergy at the lowest compensation levels.

Non-Stipendiary Clergy — The CPF Board has determined that CPF cannot offer benefits to clergy who are not paid by the Church. While recognizing emerging trends in deployment and compensation around the Church, the Board has affirmed the original purpose of the Clergy Pension Plan, which is income

replacement. CPF is required by Canon to base assessments "upon salaries and other compensation paid to Clergy." Recent revisions to the Clergy Pension Plan make it easier for an employer to establish a cleric's eligibility for benefits. Assessments paid into the Clergy Pension Plan also underwrite all other benefits and programs (e.g., Education and Wellness programs) offered by CPF. An employer who wishes to offer a cleric benefits or access to CPG programs can accomplish this by meeting the minimum requirements for eligibility under the revised rules. CPF has already begun to educate and encourage employers and clergy to understand and leverage the revised Clergy Pension Plan rules to give clergy access to pension and ancillary benefits whenever they feel it is appropriate. Also, a recent study shows that thirty-two (32) percent of the clergy who are currently non-stipendiary were compensated at some point in their Church careers and have vested benefits under the Clergy Pension Plan.

Interrupted Continuity of Service — A number of revisions to the Clergy Pension Plan are intended to benefit clergy with interrupted continuity of service. Examples include the following: (i) revisions that make it easier for part-time and lower-paid clergy to earn a full year of credited service, as opposed to fractional years, for twelve (12) months of work; (ii) revisions that create more flexibility for making personal payments into the plan during breaks in service; (iii) revisions that remove the "consecutive year" requirement for determining the Highest Average Compensation, thereby making it easier for clergy to risk leaving higher-paid service to take lower-paying positions; and (iv) revisions allowing clerics to achieve a full target benefit after twenty-five (25) years of credited service (a change from thirty (30)), whether the cleric is active or inactive at retirement.

Interim Ministries — A number of revisions to the Clergy Pension Plan are intended to benefit clergy serving in interim ministries. Examples include the following: (i) revisions that make it easier for part-time and lower-paid clergy to earn a full year of credited service, as opposed to fractional years, for twelve (12) months of work; (ii) revisions that create more flexibility for making personal payments into the plan during breaks in service; and (iii) revisions that remove the "consecutive year" requirement for determining the Highest Average Compensation, thereby making it easier for clergy to risk leaving higher-paid service to take lower-paying positions; and (iv) provisions for any cleric to retire and collect a pension provided the cleric does not work for the same Church employer from which he or she retired and the cleric doesn't earn more than a specified amount, currently $37,400.

Second-Career Clergy — Revisions that particularly benefit second-career clergy include: (i) more liberal vesting requirements so that older clergy with less than five (5) years of service can still receive benefits by the time they are of retirement age; (ii) a lump-sum payment provision for those clergy who would otherwise receive very small pensions; and (iii) relaxed requirements for clergy to perform compensated service in retirement above the compensation threshold or for the same employer for up to two (2) years, thereby allowing second-career clergy to enhance their retirement income notwithstanding shorter tenure in the Church.

CPG has had positive reactions from most individuals who have accepted its invitation to give input with respect to these changes. For a more detailed overview of this work, including a description of all of the revisions, please visit CPG's website at www.cpg.org/CPPR.

II. Study Costs of Pension Benefits in Foreign Dioceses (Resolution 2015-A181)

Resolution 2015-A181 instructed the Church Pension Group to conduct a study of compensation and costs and fees for all employee benefits (e.g., retirement, healthcare, short-term and long-term disability) etc., for clergy and lay employees in the dioceses of Province IX, the Diocese of Haiti, the Episcopal Church in Cuba, and Covenant Partners, to provide to the CPF Trustees information and guidance on alternative programs and strategies, such as employee contribution plans, that will improve clergy and lay pension plans in these areas, to discuss their findings with diocesan leaders, and to report their findings back to the 79th General Convention.

The purpose of this study would be to provide appropriate information and costs about employee benefit coverages to diocesan leaders and to provide the Church information on the current state of employee benefits in those areas. CPG management also expanded the scope of the study to include the Diocese of the Virgin Islands.

Since the last General Convention, CPG has been studying the cost and competitiveness of employee benefit offerings in non-domestic dioceses and discussing its findings with each of the dioceses involved in the study. More specifically, CPG has worked with bishops and lay leaders to collect benefits information and has retained a third-party expert to compare the benefits offered by employers to clergy and lay employees in these non-domestic dioceses and churches with appropriate benchmarks in every country.

Pension benefits are the central feature of clergy benefits packages in the non-domestic dioceses. With the exception of Puerto Rico, pension benefits are not available to lay employees. Furthermore, each local diocese takes responsibility for evaluating and determining the need for the health and welfare benefits packages for clergy and lay employees. This may include benefits for healthcare, wellness, group life insurance, short- and long-term disability, paid time off, and meals. CPG's research included an evaluation of all of these benefits, including an evaluation of the retirement benefits provided by the International Clergy Pension Plan.

Research Findings

CPG's initial findings from this study include:

- Retirement, life, and disability benefits provided through the International Clergy Pension Plan exceeded the benefits available to similar professionals in the local markets.

- The International Clergy Pension Plan is a primary feature of the clergy benefits package in most non-domestic dioceses. The current formula provides one hundred (100) percent income replacement for full-career (twenty-five (25) years of credited service) clerics with a Highest Average Compensation of $10,000 or less and also provides death and disability benefits.

- Private employer-provided pension plans are not common. As a result, retirement benefits for non-domestic clergy are significantly above market.

- Compensation for international clergy is low compared to local markets where similar types of responsibilities are involved.

- Pension benefit amount is somewhat dampened by lower compensation.

- Compensation data for lay employees is generally unavailable.

- Some dioceses provide additional group life insurance coverage, including coverage for lay employees.

- Retirement benefits are not typically offered to the lay employees of the Episcopal Church.

- Healthcare benefits determined and provided by the local diocesan leadership are below market in most countries.

- Clergy and lay employees' differing levels of health and welfare benefits coverage vary by diocese, specifically with regard to eligibility criteria and cost-sharing guidelines.

- Retirement benefits for International Clergy Pension Plan beneficiaries are provided in U.S. dollars. Inflation impact and local currency variability affect purchasing power, with the U.S. dollar exerting a positive impact compared to local currencies over the past five (5) years.

- Inflation negatively impacted nearly all the countries studied.

- Credible inflation data for Venezuela and Cuba was not available.

CPG's study of governmental social security benefits in these dioceses brought additional insights:

- All of the countries studied offer social security benefits.

- Governmental social security programs are less generous than the U.S. Social Security program.

- Half the countries surveyed have no regular process for indexing social security benefits.

- Church employer participation is lacking or inconsistent because clergy and lay worker participation is not always mandatory.

- Clerics who opted to participate in social security benefits voluntarily found the enrollment process difficult and hard to do on their own.

- Limited participation in governmental social security programs may increase the need for a robust private employer pension plan that provides adequate levels of income replacement in retirement for clergy and lay workers.

Alternative Strategies and Topics for Future Discussion

CPF's final report to General Convention provides cost and fee data and when complete will be available at www.cpg.org/GC2018. Strategic considerations relating to the benefit gaps identified by Resolution A181 research, including the possible need for further research regarding local social security participation, the establishment of additional retirement savings programs to address the needs of lay workers, and the development of enhanced health and welfare benefit programs through aggregate purchasing tactics, will also be available once complete at www.cpg.org/GC2018. CPG plans to review its Resolution A181 research and findings with the bishop for each non-domestic diocese before the 79th General Convention.

III. Divest From Private Corporations in the Prison Business (Resolution 2015-D067)

Resolution 2015-D067 directed the Episcopal Church to continue a no-buy policy with respect to corporations that own or operate for-profit prisons and encouraged CPF to institute a similar no-buy policy.

CPF does not own direct investments in for-profit prisons. However, to the extent possible, it is committed to leveraging its shares in other companies to address human rights violations wherever they occur, which may include public and for-profit prison systems.

IV. Strengthen the Relationship with the Episcopal Church of Cuba (Resolution 2015-B003)

Resolution 2015-B003 established a team, which included CPF, to continue strengthening the relationship between the Episcopal Church and La Iglesia Episcopal De Cuba with the goal of fostering better understanding and fellowship.

The resolution directed the establishment of a team to facilitate collaboration and, accordingly, the Task Force on the Episcopal Church in Cuba was created. CPG served a supporting role on the Task Force. Specifically, CPF worked with its own actuaries to calculate and describe the financial impact of allowing active Cuban clergy to participate in the International Clergy Pension Plan. CPG's chief operating officer attended two (2) meetings of this Task Force and explained the responsibilities of CPG as plan sponsor and plan administrator.

V. Instruct CPG to Study Disability Plan for Lay Employees (Resolution 2015-B016)

Resolution 2015-B016 instructed CPF to study the feasibility of a mandatory, short-term disability (STD) plan for all lay employees of the Episcopal Church and to report its findings to the Executive Council.

Identifying Patterns and Attitudes Toward Short-Term Disability Coverage

In 2016, CPG analyzed its own data on short-term disability and conducted a survey to identify gaps in coverage. CPG's analysis revealed that approximately fifty (50) percent of congregations with benefit-eligible employees offer some form of short-term disability coverage. Of the congregations that do not offer coverage, sixty-five (65) percent cited cost as a blocker, 27.5% confessed that they had not thought about it, and 7.5% simply did not see the need.

Survey respondents were asked to indicate a price level at which short-term disability coverage would be attractive. Thirty (30) percent indicated that coverage would be too expensive at any price, thirty-five (35) percent said they would be willing to pay a premium of $15–$35 per employee per month, and thirty-five (35) percent would be willing to pay a premium of only $5–$15 per employee per month.

Estimating the Cost to Provide Coverage to Those Who Do Not Have It

CPF estimated the cost of providing standard short-term disability coverage to lay employees to be approximately $15 per employee per month.

These results and others were presented to the Executive Council in October 2016. A copy of the full report is available at www.cpg.org/GC2018.

While CPG identified gaps in short-term disability coverage and in general product awareness among those surveyed, it did not find significant support for mandating short-term disability coverage for lay employees.

In fact, concerns about cost suggest that a mandate might not be well received by many, at least absent further education and knowledge.

VI. Extend Pension Benefits to Same-Gender Couples (Resolution 2015-D047)

The CPF Board was directed to continue to review and revise the pension plan rules so that participants in the plan with same-gender spouses and their spouses are treated the same as participants with opposite-gender spouses in all respects, to avoid discriminating against same-gender couples, who in the past were not able to marry under civil law. The revisions also include the addition of a transition period to provide equal benefits to married couples, including special provisions for surviving partners of deceased participants in the plan.

CPF revised its Clergy Pension Plan and Lay DB Plan rules to achieve equality for same-gender spouses in 2011, long before this resolution. At that time, CPG offered a transition period that allowed same-gender married couples to qualify for benefits under relaxed rules. Subsequently, CPG extended the transition period a second and a third time, with the final transition period ending on December 31, 2017. For more information, please visit www.cpg.org/active-clergy/retirement/pensions/benefits/survivors-benefits/.

VII. Authorize for Trial Use Marriage and Blessing Rites Contained in "Liturgical Resources I" (Resolution 2015-A054)

Church Publishing Incorporated has published the revised edition of *I Will Bless You and You Will Be a Blessing* in direct response to Resolution 2015-A054. See Resolution 2015-A054 in the Episcopal Archives for details and context.

VIII. Establish Church-Wide Parental Leave Policy and Practices (Resolution 2015-D030)

Resolution 2015-D030 strongly urged all dioceses, congregations, and other church-related offices and agencies/contexts to establish and make available parental leave policies for birth and adoptive parents, both clergy and lay, in their employ. The 78th General Convention further directed CPG to increase publicity and knowledge about the provisions provided through short-term disability, and directed the Executive Council in consultation with CPG to prepare a church-wide model policy on parental leave for both birth and adoptive parents for consideration by the 79th General Convention.

CPG stands ready to assist the Executive Council with this work when requested to do so.

CHURCH PENSION FUND [CPF] AND SOCIALLY RESPONSIBLE INVESTING (SRI)

Socially Responsible Investing [SRI] was a major topic of discussion at the 78th General Convention, and it continues to be an important topic around the Church. For this reason, CPF decided to summarize its efforts in the Blue Book. Additional information can be found on its website at www.cpg.org/SRI.

CPF has been committed to SRI for decades. In that time, it has leveraged the following high-impact strategies to significant effect:

- Investing for Positive Impact: proactively seeking out and investing with managers who deliver both strong returns and positive social outcomes;

- Shareholder Engagement: using CPF's position as an institutional investor to influence the behavior of companies in its investment portfolio; and

- Thought Leadership: sharing CPF's experience and its industry relationships to create awareness of modern, effective strategies for using capital to achieve positive social impact.

Each of these strategies is summarized below.

I. Investing for Positive Impact

As a fiduciary, CPF's SRI strategy remains focused on working with external investment managers who possess expertise in identifying investment opportunities that offer fully competitive risk-adjusted returns while providing a positive social impact. Importantly, the primary objective of its Socially Responsible Investing [SRI] approach is to earn returns that are sufficient to ensure that benefits promised to current and future beneficiaries are available when needed. Three (3) areas where CPF actively invests include environmentally responsible, economically targeted and women- and minority-owned firms.

Environmentally Responsible

The sustainability of the environment is important to CPF. For that reason, it continues to seek managers who possess expertise in environmentally responsible investments. CPF has investments in a number of funds that support and promote sustainable forestry, clean technology and green buildings.

Sustainable Forestry
CPF has invested in several sustainable forestry-related initiatives, including investments in sustainable forest funds managed by The Forestland Group, which promotes and employs sustainable forestry practices and has captured and stored four hundred and eighteen thousand (418,000) tons of carbon dioxide.

Clean Technology
CPF has made investments in more than one hundred (100) clean technology projects. These investments generate or promote the use of solar energy, wind, hydro, geothermal, and biomass fuels or provide solutions for photovoltaic cells and refrigerants. CPF has also funded cutting-edge technologies and has investments with companies that manufacture electric vehicles and produce lithium batteries.

CPF served as an anchor investor in the Developing World Market's Off-Grid, Renewable and Climate Action Impact Note (ORCA Note). The ORCA Note provides renewable energy finance loans to socially responsible businesses in Ecuador, Guatemala, India, Kazakhstan, Kenya, Mongolia, Nicaragua, Rwanda and Tanzania and is composed of eleven (11) underlying loans made to inclusive financial institutions and operating companies.

Green Buildings
CPF supports sustainable construction principles and has made real estate investments in more than sixty-five (65) LEED (Leadership in Energy and Environmental Design) certified buildings and more than ten (10) BREEAM (Building Research Establishment Environmental Assessment Method)

certified buildings. In addition, CPG's headquarters is a Gold-certified LEED space in recognition of the implementation of environmentally sustainable practices in the construction and operation of its New York City office.

Economically Targeted

CPF's economically targeted investments have traditionally focused on microfinance-related initiatives, affordable housing, sustainable farming and urban redevelopment.

Microfinance

CPF served as an anchor investor through its investment in the Essential Capital Consortium, a social enterprise fund managed by Deutsche Bank's Global Social Finance Group. This investment will finance approximately twenty (20) enterprises that are focused on providing debt financing to companies in the energy, health, and microfinance sectors in developing countries.

Affordable Housing

CPF's investments have enabled the construction or preservation of nearly fifty-four thousand (54,000) affordable housing units throughout the United States. The demand for affordable housing units is expected to increase in the coming years, as the Urban Institute has reported that for every one hundred (100) extremely low-income renter households in the United States only twenty-nine (29) affordable and available rental units are available.

Sustainable Farming

CPF's investment in Silverlands, a private equity fund managed by SilverStreet Capital, supports indigenous farmers in sub-Saharan Africa. Silverlands' efforts have been instrumental in improving the lives of thousands of people in the region.

Urban Redevelopment

CPF has funded more than three hundred and twenty (320) urban redevelopment projects in cities around the world. These projects have had a positive impact on local communities in reducing crime, improving housing stock, and increasing economic vibrancy. These included retrofitting buildings and constructing new housing.

Women and Minority Owned Firms

CPF continually seeks managers who provide access to investments that offer competitive risk-adjusted returns. Over the years, CPF has been fortunate to work with a number of woman- and minority-owned fund managers. CPF currently has investments in twenty-five (25) funds that are women or minority owned.

II. Shareholder Engagement

Productive Dialogues

CPF uses its position as a large institutional shareholder to engage companies on social and environmental issues that have long-term investment implications. It looks to promote productive dialogue and, if necessary, file shareholder resolutions to encourage these companies to conduct their business in a manner that addresses important social and environmental concerns of the Episcopal Church.

For decades CPF has collaborated with the Committee on Corporate Social Responsibility [CCSR] of the Executive Council of the Episcopal Church and the Domestic and Foreign Missionary Society of the Protestant Episcopal Church (the "DFMS") — as well as with other faith-based organizations and investors — to discuss its shared concerns and develop strategies for addressing those concerns. CPF is also a member of various investor groups, including the Interfaith Center on Corporate Responsibility and the CERES Investor Network; and coordinates its shareholder engagement efforts with other investors having similar interests.

CPF has focused its attention, in particular, on encouraging companies in its investment portfolio to address issues related to the environment, human rights violations, and corporate board diversity. Shareholder engagement efforts often require years of dialogue, but CPF believes it has made great progress with companies in addressing its concerns.

CPF is very proud of its shareholder engagement efforts, which support its commitment to corporate social responsibility and the values of the Episcopal Church while allowing CPF to pursue its own vision of providing the highest possible level of financial security in retirement for the clergy and lay employees of the Church.

Voting Proxies

Every publicly traded company conducts an annual meeting during which its shareholders cast votes on a variety of issues, ranging from the election of corporate directors and approval of auditors to various issues proposed by shareholders. Shareholders generally vote on these issues in advance of the annual meeting by submitting a completed proxy to the company.

CPF works with CCSR and the DFMS to decide how to vote proxies for the shares it holds. As a result of this joint effort, CCSR established a set of proxy voting guidelines for the Episcopal Church several years ago, and these guidelines were approved by the Executive Council. To view these guidelines, please refer to the following url: http://www.episcopalchurch.org/page/socially-responsible-investing.

CPF follows the proxy voting guidelines of the Episcopal Church when voting proxies for the investments in its portfolio to the extent consistent with its fiduciary responsibilities. In this way, it supports important social, ethical, and environmental concerns of the Episcopal Church while striving to achieve the highest possible level of financial security in retirement for clergy and lay employees of the Church.

III. Thought Leadership

CPF has operated in the Socially Responsible Investing [SRI] space for several decades and has garnered a reputation for being an experienced and respected impact investor. CPF uses its thought leadership to convene people and connect investors with SRI fund managers and opportunities.

As part of CPF's ongoing commitment to increase the awareness of SRI and foster relationships among those interested in the topic, it periodically hosts roundtable discussions to share ideas and discuss the opportunities and challenges of social investing. CPF's New York City roundtable with Equilibrium Capital, a global asset manager focused on sustainability-driven real asset strategies, funds and products; brought together individuals from various investment firms, pension funds, faith-based organizations, consulting agencies, research institutes and family foundations to share ideas and discuss the opportunities and challenges that SRI presents.

In London, CPF co-hosted a roundtable discussion with Bridges Fund Management, a specialist fund manager dedicated to using an impact-driven investment approach to create superior returns for both investors and society at large. The event brought together individuals from a number of investment firms and pension funds as well as representatives from Trinity Wall Street and the Church Commissioners for England. The group shared ideas on SRI opportunities around the globe and the growing interest among institutional investors in SRI.

CPF executives regularly attend and speak at SRI conferences around the world. These conferences are designed to elevate the industry's shared understanding and approach to SRI. Attendees often include other institutional investors, government officials and non-profits focused on advocacy. In addition to building relationships with leading SRI-management firms, these events offer CPF the opportunity to share its perspectives on SRI-related issues and provide a forum to identify positive impact investment opportunities.

As part of its centennial celebration, CPG is hosting a series of conversations around the Church called Insights & Ideas: Centennial Conversations. Each event includes a robust discussion on the topic of positive impact investing. To facilitate discussion, CPG has recruited third-party experts in this space, senior members of its own investment team and members of the CPF Board to share information, insights, and ideas on the topic of positive impact investing. The goal of these events is to give institutions of varying sizes inspiration and actionable ideas about how to use capital to have a positive social impact while realizing competitive returns. Each event has been videotaped and a compilation video will be available on CPG's website this spring.

CPF remains committed to sharing its views on the topic of SRI more broadly and has developed a series of Executive Q&A and investment case study videos, which can be viewed at www.cpg.org/SRIvideos.

CONCLUSION

The past triennium has been a productive time at CPG. CPG has undertaken a comprehensive review of the Clergy Pension Plan, a study of benefits offered in the non-domestic dioceses, a study of disability benefits, and a study of clergy deployment trends. CPG did all of this while constantly monitoring the financial strength of the organization, continuing its essential investment activities, including socially responsible investing, and delivering a high standard of care to the individuals and institutions that depend on it for help.

One hundred (100) years into its service, CPG remains committed to providing its clients with the highest possible level of financial security in retirement that is consistent with exemplary financial stewardship on our part and with the evolving needs of the Church. This Blue Book Report describes some of CPG's work in this regard, but additional useful information can be found on CPG's website, at www.cpg.org, including CPG's report to the State of the Church Subcommittee on the Church Pension Group.

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Educating and Forming lay and ordained leaders for the church in the changing world.
[Adopted by the Board of Trustees in 1999; reaffirmed October 23, 2015.]

Summary of Work

HISTORY

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 our two hundred (200) years, General Seminary has always had a two (2) part mission: education *and* formation. In order to achieve those equally important missional goals, we have three (3) foci of sustainability and are building upon Four Strategic Pillars.

THREE FOCI FOR SUSTAINABILITY

In order for General Seminary to continue into the next two hundred (200) years of our life, we must be sustainable three (3) ways: financially, missionally and culturally.

Financial sustainability means that on a mid and long term basis, we must only spend the resources we have available. Plainly put, sooner rather than later, the proverbial lines must meet. At the time of our

last General Convention report, we had a structured annual budget deficit of almost $3 million. In the most immediate fiscal year (2016-17), we ended with a bottom line surplus, even after accounting for depreciation and maintaining a responsible five (5) percent endowment draw. This past year, we welcomed our largest entering class in recent times, over doubling the number of new students from several years' past. We pay attention to every revenue source (annual giving, five (5) percent endowment draw, housing, tuition and ancillary income), none of which account for over twenty (20) percent of our total operating income. We are ever-vigilant on spending. With a myriad of factors determining the bottom line each year, our trajectory is highly favorable and the 2012 *Plan to Choose Life* is being fulfilled. General Seminary is embracing realistic financial sustainability.

Simply put, missional sustainability means that we must do something that the Church wants and needs. The 2014 *Way of Wisdom* and its capstone, *The Wisdom Year*, was a specific response to a near-universal plea across constituencies that General Seminary educate and form leaders ready to "hit the ground running." Now in its fourth full year, the *Way of Wisdom* is producing those desired results by giving ordination-track graduates the intellectual grounding and sophistication – paired with real life training and decision-making – to prepare them for ministry in the 21st century. We continue to respond to the Church's desires by creating new degree and certificate programs, ever improving our provision for ordination-track leaders and providing accredited degrees and other offerings for lay leaders alike.

Similarly, educational excellence continues to be embraced by General Seminary. We have twenty-five (25) faculty members of all classes, the vast majority of whom possess terminal degrees and all of whom are actively engaged in scholarship and service within the Church and the Academy. The Christoph Keller Library has maintained its preeminence as a leading center of Anglican Studies for the entire Church, with a collection that serves as a resource to Anglicans throughout the Communion. Beginning with a self-study in 2016, our accreditation through ATS was reaffirmed (without notation) through spring/Easter 2024. General Seminary is embracing missional sustainability by responding to the Church's present-day needs.

Finally, cultural sustainability is embodied by our common vision. With agreement across constituencies, we are able to devote resources efficiently and effectively to the shared goal set forth in our Mission Statement. Stakeholders and evaluators alike have observed our steadfast commitment to a shared vision. As an entire community we are invested in educating and forming leaders for the Church. We are culturally sustainable and continue to work to embrace systemic health and wholeness.

FOUR STRATEGIC PILLARS

To live into our Mission Statement and keeping our eye on the above three (3) foci of sustainability, we are building on four (4) Strategic Pillars:

Strategic Pillar I:
Continue to refine our traditional ordination-track Master of Divinity program with responsive attention to the evolving needs of the Church and the world.

Continuation of General Seminary's two (2) centuries old commitment to academic excellence together with renewed attention on formation reflect the Church's expressed desire for preparation of ordained leaders for the 21st century church. *The Way of Wisdom* integrates all disciplines of seminary education to provide an enriching, integrated, and contemporary multidisciplinary experience combining our traditional rigorous academics; hands on experience in Chapel service and parish ministry; and practical training in a wide range of subjects, from pastoral leadership to financial stewardship. This approach culminates in *The Wisdom Year,* in which seniors will have the opportunity to synthesize all they have learned by serving in real-word paid, part-time positions in ministry settings.

Strategic Pillar II:
Develop substantially more non-ordination track, non-residential, vocationally-focused Master of Arts and Certificate programs in related areas, useful to the wider Church and the world.

Through its recently accredited MA in Ministry and its well established MA in Spiritual Direction, General Seminary is positioned to offer a wide range of degree programs that prepare laypersons for careers in such areas as spiritual direction, pastoral care, pastoral counseling and youth and young families ministries and chaplaincies. These programs significantly benefit the Episcopal Church and other denominations and support our efforts to achieve each of the three (3) foci of sustainability. Preparation for vocationally-focused lay ministry preparation is an important part of General Seminary's next two (200) hundred years.

Strategic Pillar III:
Seek out and embrace partnerships and affiliations of all types.
By joining forces with other seminaries and educational institutions, students at each these institutions will be able to tap into an even wider range of world-class learning experiences at a time when financial pressures are limiting the ability of all of these institutions to expand their curricula. Our New York City presence, compelling integrated offerings and the world class faculty we can attract from throughout the tristate area will make us a key beneficiary of these alliances and provide the basis for exploring even deeper partnerships. Fellow Episcopal and other Christian seminaries are also natural partners for relationships of all kinds.

Strategic Pillar IV:

Engage in a successful capital campaign for preservation, renovation and refreshment of the Chapel of the Good Shepherd, together with a major gifts initiative for endowment of scholarship, programs and faculty positions.

The repair, refurbishment and endowment of the Chapel of the Good Shepherd is a key priority at General, and will be the goal of a major gifts initiative tower the next five (5) years. A planned Capital Campaign will also focus on permanent support for positions, programs and scholarships. Funding for entrepreneurial ventures will also be included. This major-gifts initiative is set to correspond to our two hundred (200) years of anniversaries (establishment, incorporation, matriculation of first class, appointment of first faculty, first graduation and establishment on Chelsea Square).

AN IMPORTANT CHALLENGE FOR GENERAL SEMINARY AND THE 2018 GENERAL CONVENTION

With ongoing success in embracing financial, missional, and cultural sustainability and building upon the Four Strategic Pillars, General Seminary is addressing a fifty (50) year challenge head on: board size.

For Fifty (50) years, The Association of Theological Schools has urged governance changes.
Beginning nearly fifty (50) years ago, our accrediting agency, the Association of Theological Schools, on every successive comprehensive re-accreditation visit has made the same observation evolving into clear recommendations: address the board size and revise the structure to be more nimble. The following are excerpts of nearly fifty (50) years of ATS decennial reports chronicling those recommendations:

1968: It might be wondered whether ecclesiastical control of this kind [election of two-thirds of trustees by General Convention] could serve to hamper the effective development of a seminary in terms of the internal dynamics appropriate to an educational institution. The long history of the school appears to offer no significant evidence of this having occurred. Indeed, if there is a problem at all it may well be of the contrary nature, namely, a question as to whether this method of election of Trustees promises to bring as much involvement in the life and work of the Seminary as might be desired. But, this is only a passing observation. [1968 Accreditation Report (April 21-15, 1968 Comprehensive Visit) *Excerpt from page 3*]

1977: Structure. A. Governance and Administration. The Board of Trustees of General Theological Seminary is composed of competent and dedicated people, including a large number of clergy and some lay people. We commend the Board for its interest in the Seminary and for its recent action in restructuring the Board. We recommend, however, that: 1) the Board be reduced in size to make it

an even more effective instrument... [1977 Accreditation Report (November 6-9, 1977 Comprehensive Visit) *Excerpt from page 6*]

1984: Governance and Administration. It cannot be stated strongly enough that the role of the Board of Trustees is crucial to the future well-being of the General Theological Seminary. This report wishes to single out the Board as the single most important element in the structure of General Theological Seminary during the period of 1984-1990. The reason is the role that only an active, vigorous Board of Trustees can play in institutional advancement. ...

The issues and concerns that such a project might encompass should include the following:

a) Initiation of the following areas of inquiry is in order: a review of the relationship of the Board to the General Convention of the Episcopal Church; various discussions of its merits; and a decision as to its value for General by 1987...

d) The manner of electing members to the Board, particularly the need for GTS to have a role and/influence on the selection of nominees to insure that genuine interest to serve the Seminary is keenly present and that the classic roles of Trusteeship are understood and actively embraced.

e) If these issues are adequately addressed, then the issue of the right working size of the Board will receive the review it merits. [1984 Accreditation Report (November 13-16, 1983 Comprehensive Visit) *Excerpt from pages 3-4*]

1994: Governance and Administration. Board. The Board of Trustees of GTS is made up of forty-two (42) members, with the usual set of committees. Currently a special Board Committee has the task to review Board mission, structure and functioning. It has not yet finalized its recommendations. The likely outcome is some streamlining and downsizing in order to make possible more "ownership" of the school by board members and an outcome which appears desirable. [1994 Accreditation Report (November 13 – 16, 1994 Comprehensive Visit) *Excerpt from pages 3-4*]

2004: Authority and Governance. In response to long-standing concerns about the ineffectual structure of the Board of Trustees and a general lack of "ownership" by a number of individual trustees, in 2001 GTS contracted with Malcolm Warford of the Lexington Seminary to consult with the Board and administration, conduct a survey and prepare a report. [2004 Accreditation Report (November 14-17, 2004 Comprehensive Visit) *Excerpt from pages 10-11 (unnumbered)*]

[N.B. The Warford report recommended the "Commission" system, significantly increasing the number of participants in board governance. During the lead-up to the financial crisis beginning in 2010 and continuing through the governance consulting of In Trust President Dr. Douglass Lewis in 2014, this increased diffusion of decision-making was widely recognized as one of the significant contributing factors of the lack of financial and missional oversight from 2004 onward.]

2016: Authority and Governance… Based on rules set forth in the Constitution, the Board of Trustees is unusually large (42) and its membership is elected by various sources; its own nominations, alumni elections, the General Convention of The Episcopal Church and others by virtue of the offices they hold. The school has worked around its cumbersome size and election process by empowering its Executive Committee to function between board meetings. Although the board has become decidedly more transparent in the last two (2) years, the Executive Committee functions almost as a "Board within the Board."

Every trustee who was interviewed stated that the Board of Trustees was too large to be fully effective in governing a school that is intent on meeting the challenges of contemporary theological education. This may be especially true in the case of GTS, whose board will be required to oversee the establishment of a new culture of planning, evaluation and financial sustainability. In these times, such work requires a board that is nimble, that has a steadfast adherence to mission, and that exercises its authority only as one body.

The evaluation committee understands that board composition and structures of election can be amended only by mutual agreement of the Board of Trustees and the General Convention of The Episcopal Church and that GTS is limited in its ability to influence the Convention. With that fact in mind, we encourage that attention be given during the next period of accreditation to the size and complexity of the school's unusually large board (forty-two (42) trustees elected by four (4) different bodies and, until recently, an additional twenty-four (24) non-voting representatives), and how it can be reduced and simplified for greater nimbleness and self-direction so that it may continue to most effectively meet the demands of 21st century theological education (Standard 7, section 7.3.1.10). [emphasis in the original] [2016 Accreditation Report (November 14-17, 2016 Comprehensive Visit) *Excerpt from pages 10-11*]

[N.B. The "additional twenty-four (24) non-voting representatives" referred to the ill-advised expansion of the board under the "Commission" system instituted after the 2004 Warford recommendations.]

[End of 1968 – 2016 ATS reaccreditation report quotations]

The ATS has been clear for nearly fifty (50) years: General Seminary's forty-two (42) person board is too large to be as effective as necessary in the 20th and 21st century.

For 150 years, General Convention has struggled with how to establish a seminary for the *whole* Church.
General Convention has similarly struggled with how to help General Seminary create effective governance. In 1814, the relatively new Episcopal Church began to discuss and debate how to educate and form ordained leaders for what it hoped would be growth less. This was less than forty (40) years after the near death of our Anglican faith following the American Revolution. By 1817, the debate

ended and the Church chose national training for priests rather than local, diocesan training. The *General* Theological Seminary was encouraged to be born. A little later, by act of the New York Legislature, sponsors separately incorporated General Seminary under New York law and that institution continues to this day.

Despite conclusion in 1817, the debate about local vs. national training did not end. By the next General Convention, Virginia had its own seminary and General Seminary had not yet coalesced as the general expression which General Convention had desired. A little later, with the financing of Jacob Sherred and the gift of land by Clement Clark Moore, General Seminary then had a permanent home and funding, yet, regional desires for seminary training continued. Other seminaries were being formed in other areas of the rapidly expanding United States.

The next ninety (90) years were an effort by General Seminary to live into its role as a seminary for the whole Church by using the vehicle of governance. A complex system was devised whereby each diocese had certain seats on an ever-expanding Board of Trustees, all based on what amounted to the level of diocesan monetary contributions. This House of Representative approach - with donated money as the electorate - was balanced by a Senate-esque appointment of each and every bishop in The Episcopal Church to the General Seminary board. Clerical and lay trustees appointed by dioceses served alongside every bishop in The Episcopal Church. Though unicameral, the almost-hundred year's experiment of General Seminary was to embrace the whole Church through governance.

The written annals of General Convention frequently chronicled the growing dis-ease of a board of that size. For the three (3) successive conventions of 1871 in Baltimore, 1874 in New York City, and 1877 in Boston, General Convention struggled with the size of the governing board of General Seminary. In Philadelphia in 1883, General Convention acknowledged a need for change as the "number of trustees is almost 400 and growing." In Richmond in 1907, the convention journal stated that the "present method prescribed for the government of the Seminary in the selection of Trustees is cumbrous, antiquated, and unsatisfactory." By 1913, the New York City General Convention finally passed resolutions, to which the General Seminary Board of Trustees agreed, to reduce the over four hundred (400) members to a then-lithe forty-two (42).

Current attention to size of board membership
In response the fifty (50) years of ATS urging and one hundred and fifty (150) years of General Convention struggles, we have collaborated with the Resolution 2015-D075 General Convention Task Force Regarding the Relationship between General Convention and General Seminary regarding our board size. Now, General Seminary needs the help of the 2018 General Convention.

The board size is set forth in our Constitution. Neither General Convention nor General Seminary may unilaterally change it; both must agree. Board size and composition is something both have struggled with for our two hundred (200) years of history together. The conclusion is that the fond memories

of history should never dictate future acts. That is, history is history; forward movement is its own initiative. Good forward movement changes the future.

The usefulness of the current relationship is also important. As chronicled above, the nature of the relationship between General Seminary and General Convention is about the struggles with governance and how it may have served in ages past, but it neither serves the 21st century Church nor Seminary. The noble undertaking of using governance to (a) keep close ties between General Seminary and General Convention, and (b) create a "representative type" of governance, however well meaning, never achieved its goal. The birth of almost all of the other seminaries in The Episcopal Church occurred during this time and General Seminary was increasingly not *general*. Throughout the decades of debate about General Seminary's governance, the *quality* of the plethora of board members was never challenged; the *quantity* was always recognized as the functional challenge.

The current size of forty-two (42) trustees with various constituencies electing members was born out of that crash diet of the 1913 General Convention. Over the next one hundred (100) years, the way the forty-two (42) members were chosen continued to be refined, but each version always defaulted to four (4) independently-elected groups: trustees, General Convention, the seminary alumni, and three (3) individuals (elected by three (3) different bodies on their own) *ex-officio*. In 1994, the current constitutional structure was approved by both General Convention and General Seminary, not reducing the total number of trustees, but redistributing the way they are elected. Now, twenty-four (24) members are elected by the board itself, nine (9) members are elected by the alumni, six (6) members are elected at each General Convention (two (2) bishops, two (2) priests/deacons, and two (2) laity), and three (3) members serve *ex-officio,* each elected by another body altogether. Forty-two (42) board members elected by five (5) different bodies!

Never - literally *never* - has anyone described the size and electoral complexity of our Board of Trustees to anyone and received the response, "now that's a good idea." No one has ever expressed even the remotest thought that a forty-two (42) member board elected by five (5) independent bodies is either efficient or useful. No one has ever even hinted that with a blank piece of paper, this is the governance system which would be created.

No one has made a single argument - ever - that our current governance structure is as effective as it should be. Just like the forty (40) plus years of debate from 1871-1913 to re-structure the Board from over four hundred (400) members to forty-two (42), there was never any question that each of the members were of high quality. Rather, it was then as it is now, an issue of size. No other Episcopal seminary has anywhere close to forty-two (42) board members: they range from twelve (12) to thirty-one (31) with a wide range in between. No other ATS accredited theological school has forty-two (42) board members from five (5) independent bodies either.

The lack of utility and efficiency of the current constitutional structure has been borne out by history and reviewed by well-qualified outsiders. For *over almost fifty (50) years of analysis*, ATS has recommended a change in governance size and flexibility, including our most recent accreditation report: "every trustee who was interviewed stated that the Board of Trustees was too large to be effective in governing a school that is intent on meeting the challenges of contemporary theological education." The 2016 report even bluntly said that attention must be given to "the size and complexity of the school's unusually large board (forty-two (42) trustees elected by four (4) [actually, five (5)] different bodies...) and how it can be reduced and simplified for greater nimbleness and self-direction so that it may continue to most effectively meet the demands 21st century theological education."

In addition to the ATS and historic General Conventions, the former Presiding Bishop provided a 40,000-foot perspective of Church governance. Less than a decade ago, the Most Rev. Katherine Jefferts Schori announced at General Convention that "the watch word of the Church today must be 'alacrity'." While she may not have been speaking directly about General Seminary, she was referencing Church structures in general. In summary: we must be nimble!

A forty-two (42) member board with a constitutional structure able to change every three (3) years and only upon identical agreement of both General Seminary and General Convention is the antithesis of 'alacrity.' We are distinctively not nimble *because of* the structure of our governance. When constitutional changes can only happen during one ten (10) day period in July or August every three (3) years by getting almost one thousand (1,000) deputies to agree with over two hundred (200) bishops and at the same time be in concord with forty-two (42) board members who do not meet concurrently with General Convention; creates structural impediments to needed constitutional change. The legislative record shows how often it has been debated vs. how often it has happened.

Our own recent history has demonstrated the difficulty of our cumbersome governance structure. For example, in the most recent financial crisis of 2009-2011, the accepted lore is that a decade ago, the board as a whole was caught off guard that General Seminary had amassed over $42 million in mortgage-secured debt and was rapidly running out of cash. No one person was at fault in that crisis and the board as a whole was comprised of well-meaning, devoted bishops, priests and laity, all elected from various constituencies. Rather, the system failed itself. With forty-two (42) members all elected from those various constituencies, many former board members reported that it was easy to feel detached and that "someone else" would fix the myriad problems. The almost fifty (50) years of ATS analysis had come to life.

An overly large board encourages lack of ownership (ATS' word) or in other words, buy-in. Further, the appointment/election mechanism of four (4) independent and separate bodies transmit a constant, albeit incorrect, reminder to board members that they have a duty to their electing constituents. Well-recognized non-profit law conversely requires a duty of loyalty by serving board members to General Seminary alone and never to the electing/sending bodies. Often times, as board

members feel they are "representatives" of who elected them, the myriad issues of fiduciary duty are clouded. Devoted, well-meaning members' actions are defeated by the size and complexion of a governance system designed over one hundred (100) years ago in 1913. Again, no one person fits the failing; the structure promotes failure.

The 1871, 1874, 1877, 1883, 1907 and 1913 General Conventions, the ATS reports of 1968, 1977, 1984, 1994, 2004 and 2016, a multitude of Church and governance leaders, and our own living history are all unanimous on the need for change. Each has addressed how the size and complexity of the General Seminary board has had a direct effect on the quality of governance. The General Seminary board and its constituents all agree that a change is necessary.

This General Convention now has the opportunity to positively affect the future.

THE WAY FORWARD: A PROPOSED RESOLUTION FOR AN EFFECTIVE AND EFFICIENT 21ST CENTURY SEMINARY.
Sheer size and election-complexity has held General Seminary's board from working at maximum efficiency and effectiveness for over one hundred (100) years. But, fortunately, the 2018 General Convention can help remedy that.

The General Seminary may be considered an "interim body" as it is listed on the General Convention web-site as such. In addition to that ability to submit an "A" resolution, we understand that groups of bishops ("B" resolutions), dioceses ("C" resolutions), and individual deputies ("D" resolutions) intend to propose identical resolutions regarding reduction of the General Seminary board size. As such, on October 19, 2017, the General Seminary board unanimously passed the following resolution to be submitted to the 79th General Convention in July, 2018 in Austin, Texas. The Alumni Board also has given its full support. Further, the 2015-D075 Committee has expressed full support for the following resolution:

[Beginning of Resolution]

Resolution A083 Implementation of The Way Forward - Establishing an effective and efficient 21st Century Seminary
Resolved, the House of _____ concurring, That the 79th General Convention concur with the October 19, 2017 unanimous resolution of the Board of Trustees of The General Theological Seminary of The Episcopal Church that Article III of its Constitution be amended as follows:

ARTICLE III
The Board of Trustees shall be constituted as follows: The Presiding Bishop of the Church; the Bishop of the Diocese in which the Seminary is located; the Dean of the Seminary; the President of the Alumni Board; one (1) Bishop chosen by the House of Bishops; one (1) presbyter or deacon and one (1) lay person chosen by the House of Deputies; three (3) persons chosen by the Alumni of the Seminary; and the remaining Trustees shall be elected by the Board of Trustees. The Board of Trustees shall fix by

Resolution from time to time at its Annual Meeting the total number of Trustees, which number of Trustees shall be not less than nineteen (19) nor more than thirty (30) members. The Presiding Bishop, the Bishop of the Diocese, the Dean of the Seminary, and the President of the Alumni Board shall be members *ex-officio.* The Bishop elected by the House of Bishops and the persons elected by the House of Deputies of the General Convention shall be elected at each convention for a term of three (3) years. The three (3) Trustees elected by the Alumni (excluding the President of the Alumni Board who shall serve *ex- officio* while holding that office) shall be elected annually by the Alumni Board for staggered terms of three (3) years. The persons elected by the Board of Trustees shall be elected at the Annual Meeting or other duly called meetings of the Board of Trustees for staggered terms of three (3) years;

And be it further

Resolved, That this shall be effective January 1, 2019, provided that it shall then have been ratified and approved by the Board of Trustees and provided further that all members of the Board of Trustees holding office on such effective date shall continue to hold office until the expiration of their respective present terms of office.

EXPLANATION

The effect of this Resolution is:

• Reduction in the board size from forty-two (42) to between nineteen (19) and thirty (30), depending on current need of the seminary and the Church, giving flexibility and speed to such annual decisions;

• Continuation of election of trustees in roughly equivalent proportions as currently provided: General Convention, alumni, the board, and the ex-officio electing bodies;

• Recognition of the significance of the alumni executive board by provision of its President/Chair as a new ex-officio member of the board; and

• Because of natural attrition, all current trustees are able to fulfill their current term and current term limits would be recognized. In other words, no current trustees would lose their place nor have to resign with implementation of this Resolution in January, 2019.

The proposed Resolution addresses the fifty (50) years of General Seminary's outside, independent accreditation body, ATS, urgings for flexibility and overhaul, one hundred and fifty (150) years of General Convention's own struggles with empowering General Seminary to be responsive to the Church's needs for the current time, and legions of Church leaders' direct and oblique comments about governance. It continues to recognize the multi-layered constituencies of The Episcopal Church's original seminary and gives it the flexibility and effectiveness needed for the rapidly evolving changes of the 21st century Church.

General Seminary needs the help of the 2018 General Convention to continue to move forward on this important trajectory. This is an opportunity for the Church to embrace a solution for an adaptive challenge rather than default to a technical fix.

[End of Resolution]

CONCLUSION

General Seminary's mission and the mission of The Episcopal Church align. The three (3) foci of financial, missional and cultural sustainability are universally applicable to all holy undertakings. Our Four Strategic Pillars are creating a flexible, responsive place for equally training lay and ordained leaders for the 21st century Church. We are pleased with our progress over the past three (3) years and have outlined a clear, broadly-supported path for adaptively addressing the governance challenges of a 21st century seminary, a seminary of the *whole* church.

Faithfully submitted,

The Rt. Rev. Clifton Daniel, III
Chair, Board of Trustees

The Very Rev. Kurt H. Dunkle
Dean and President

Proposed Resolution

RESOLUTION A083 IMPLEMENTATION OF THE WAY FORWARD - ESTABLISHING AN EFFECTIVE AND EFFICIENT 21ST CENTURY SEMINARY

DISCIPLINARY BOARD FOR BISHOPS

Membership

The Rt. Rev. Catherine M. Waynick, *president*	Indianapolis, V	2021
The Hon. A. Joseph Alarid	Rio Grande, VII	2018
The Rev. Canon Carol Cole Flanagan	Washington, III	2018
The Rt. Rev. Ian T. Douglas	Connecticut, I	2018
Mr. William Fleener, Jr.	Western Michigan, V	2018
The Rt. Rev. Dena Harrison	Texas, VII	2018
The Rt. Rev. Dorsey F. Henderson, Jr.	Florida, IV	2021
The Rev. Canon Suzann V. Holding	San Diego, VIII	2021
The Rt. Rev. Herman Hollerith IV	Southern Virginia, III	2018
The Rt. Rev. W. Nicholas Knisely SOSc	Rhode Island, I	2021
The Rev. Erik Larsen	Rhode Island, I	2021
The Rt. Rev. J. Scott Mayer	Northwest Texas, VII	2018
The Rt. Rev. Robert J. O'Neill	Colorado, VI	2021
The Rev. Dr. Angela F. Shepherd	Maryland, III	2018
The Rt. Rev. Prince G. Singh	Rochester, II	2018
Mr. Marcellus L. Smith, Jr.	Alabama, IV	2021
Ms. Deborah J. Stokes	Southern Ohio, V	2021
The Rev. Peggy Tuttle	Minnesota, VI	2018

Reference Panel:

The Rt. Rev. F. Clayton Matthews, *intake officer*
The Rt, Rev. Todd Ousley, *intake officer*
The Most Rev. Michael Bruce Curry, *presiding bishop*
The Rt. Rev. Catherine M. Waynick

General legal counsel has been provided by David Beers and Mary Kostel

CHANGES TO MEMBERSHIP

With the resignation of Bishop Clay Matthews as of June 30, 2017, the former Intake Officer, his successor in the Office of Pastoral Development, Bishop Todd Ousley, has taken on the responsibilities of Intake Officer and will serve on our Reference Panel.

Mandate

The purpose and goal of Title IV is to help clergy and members "resolve disputes in ways that promote healing, repentance, forgiveness, restitution, justice, amendment of life, and reconciliation among all involved or affected." (IV. 1) Often this process is aided by maintaining confidentiality, therefore the Disciplinary Board for Bishops does not keep written records of its proceedings unless and until a case reaches the point of being assigned to a Hearing Panel. The proceedings of a Hearing Panel are extensive and public, and are included in the archives of The Episcopal Church.

Summary of Work

During the triennium beginning in 2015 the Disciplinary Board met in conference calls.

November 23, 2015 we convened and re-elected the Rt. Rev. Catherine Waynick president. We also agreed at that time to arrange a conference call training session for all members concerning the work of Conference Panels.

January 11, 2016, we held a conference call training on the work of Conference Panels.

In the spring of 2016 (exact date eludes me) we voted to fill a vacancy on the Board with Bishop Michael Smith of North Dakota.

In June of 2016 it became necessary for me to appoint two Hearing Panels, one to consider complaints against the Rt. Rev. Zache Duracin of Haiti, and another to consider complaints against the Rt. Rev. J. Jon Bruno of Los Angeles.

Haiti: The Rt. Rev. Rob O'Neill
       The Rt. Rev. Prince Singh
       The Rt. Rev. Dorsey Henderson
       The Rev. Peggy Tuttle
       Mr. Mark Smith

The Church Attorney for this case was Ms. Josephine Hicks. (Rev. Peggy Tuttle needed to resign her place on this panel for reasons of health, and was replaced by the Rev. Dr.Angela Shepherd. Rev. Tuttle has since recovered and continues her membership on the Board.)

Los Angeles: The Rt. Rev. Holly Hollerith
           The Rt. Rev. Nicholas Knisely
           The Rt. Rev. Michael Smith

Ms. Deborah Stokes

The Church Attorney for this case was Bradford Davenport, and due to the volume of paperwork I appointed a documents manager to help coordinate their work.

The Haiti case was settled by agreement (Accord) with the Presiding Bishop. The records of that agreement were distributed according to the requirements of the canons and are enshrined in the archives of The Episcopal Church.

The Los Angeles case proceeded to a formal Hearing. Following the Hearing, and during the time of deliberation, the Panel found it necessary to pronounce a Sanction against Bishop Bruno. That Sanction was appealed, and I therefore convened the Board, according to the canons, to rule on that appeal.

We met by conference call on July 5, 2017, to deliberate. The Board (minus members of the Hearing Panel) was unanimous in dismissing the appeal – upholding the Sanctions.

The Hearing Panel has issued an Order, but as of this writing the time has not come for the President of the Board to pronounce it as a Sentence, and the filing of an appeal is still possible. Gentle readers of these minutes must watch official communications for further news of this case, which will, eventually, be enshrined …….Etc.

Respectfully submitted,

+Catherine M. Waynick
President, Disciplinary Board for Bishops

FORWARD MOVEMENT

Membership

BOARD

Ms. Anne Rudacille Schmidt, *Chair*   Texas, VII

Ms. Julie Thomas, *Treasurer*   Southwest Florida, IV

Mr. Miguel Escobar, *Secretary*   New York, II

Ms. Liz Bartenstein   Washington, VIII

The Rev. James Harlan   Central Florida, IV

Mr. Carlos de Jesus   Southerns Ohio, V

Ms. Lynne Jordal Martin   New York, II

The Rt. Rev. Daniel Martins   Springfield, V

Ms. Mimi Murley   Chicago, V

The Rev. Yejide Peters   New York, II

Ms. Pamela Wesley Gómez   Connecticut, I

The Rt. Rev. Thomas Breidenthal, *Ex-Officio*   Southern Ohio, V

The Most Rev. Michael Bruce Curry, *Ex-Officio*   North Carolina, IV

STAFF

The Rev. Canon Scott Gunn, *Executive Director*

Ms. Richelle Thompson, *Deputy Director/Managing Editor*

Mr. Jason Merritt, *Marketing Director*

Ms. Miriam McKenney, *Development Director*

Ms. Jane Lyman Paraskevopoulos, *Director of Business Operations*

The Rev. Jay Sidebotham, *Director of RenewalWorks*

Ms. Tania Z. Jones, *Executive Assistant*

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."

Forward Movement's mission is "Inspire disciples. Empower evangelists." An agency of the Episcopal Church, Forward Movement was chartered by the 51st General Convention in 1934 "to reinvigorate the life of the church and to rehabilitate its general, diocesan, and parochial work." 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.

Over twenty-five (25) full and part-time staff members manage Forward Movement's work, some stationed in offices in downtown Cincinnati and others around the United States. Together, we edit and design the publications, market them, fill orders and respond to the diverse concerns of those who call and write with comments and questions. We welcome suggestions from congregations and readers on how we can be of more use and offer better service.

Summary of Work

Today, Forward Movement carries out this work in widely varied ways. We organize conferences, including Discipleship Matters and Evangelism Matters (offered in partnership with the Presiding Bishop's Office). We offer free online resources, such as Grow Christians (www.growchristians.org), which encourages faith at home. For several years, we have worked with the Rev. Tim Schenck to offer Lent Madness (www.lentmadness.org), a fun, informative, and inspiring Lenten devotional. Thanks to a grant from the Constable Fund, we have offered high-quality free curricula in English and Spanish for all ages, most notably three (3) one-year courses for congregations: *Exploring the Bible*, *Celebrating the Saints*, and *Practicing Our Faith*. We have offered seasonal apps for iOS and Android to encourage full participation in Advent and Lent. We have a full-time social media missioner on staff, part of whose responsibilities include posting inspiring and informational content on our social media channels and others.

During Lent/Easter 2018, Forward Movement will work with many organizations across the church to encourage Episcopalians to read the Gospel of Luke and the Book of Acts. The Presiding Bishop has invited us all to go on this journey through Jesus' life and ministry into the work of the Holy Spirit in the Church. Visit the Good Book Club website (www.goodbookclub.org) for free resources and details about how this project invites all Episcopalians and their congregations to take part.

In the print realm, our focus has moved to books, many of which offer opportunities for small group discussion and reflection. We seek to offer resources that encourage discipleship, whether through daily meditation or engagement with the richness of our prayer book tradition. We continue to offer some pamphlets, the cutting-edge technology of our founding era in the 1930s, which continue to be useful in many congregations.

Material for Latino/Hispanic Episcopalians and seekers is an important part of Forward Movement's ministry. We have offered free resources, such as a guide for multi-cultural congregations who wish

to celebrate *Las Posadas*. We have created new print and online resources. Our flagship devotional is available in Spanish as *Adelante Día a Día* in print, as an e-book, on social media, and in other channels.

Our first publication was a Lenten devotional focused on discipleship in 1935. *Forward Day by Day* was the immediate successor to that first publication and has been published continuously since then. Today *Forward Day by Day* is published as a print quarterly with a circulation of about 300,000 copies per quarter, over ninety (90) percent of which is in The Episcopal Church. We have subscribers in nearly every province of the Anglican Communion, over sixty (60) nations, with the largest number outside the U.S. going to the Anglican Church of Canada. In addition to print, the devotional is available as a podcast, in Braille, as an e-book, on a smartphone app, by e-mail, and through our social media channels (Facebook and Twitter). More than one hundred thousand (100,000) copies of *Forward Day by Day* – along with other literature – are distributed free of charge each year to prisons, military bases, hospitals and nursing homes.

We enjoy working with our partners. This work enables us and them to focus on core mission, collaborating for greater effectiveness. We now carry out work in collaboration with the Center for Biblical Studies, ChurchNext, the Episcopal Church Center, the Episcopal Church Foundation, The Episcopal Network for Stewardship, and Episcopal Relief & Development, among others.

Forward Movement operates RenewalWorks, a donor-funded ministry aimed at encouraging congregations to assess their spiritual health and vitality and to respond based on what they learn in their assessment. To date nearly two (200) 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 congregations.

Forward Movement's offices are located in Cincinnati, OH, as they have been since inception. The Executive Director, the Rev. Canon Scott Gunn, oversees a staff of thirteen (13) full-time and eight (8) part-time people. While most staff are based in Cincinnati, there are also staff based in Illinois, North Carolina, Louisiana, and elsewhere in Ohio. In addition to Canon Gunn, the leadership team comprises Ms. Richelle Thompson (Deputy Director and Managing Editor), Mr. Jason Merritt (Marketing Director), Ms. Miriam McKenney (Development Director), Ms. D. Jane Lyman Paraskevopoulos (Director of Business Operations), the Rev. Jay Sidebotham (Director of RenewalWorks), and Ms. Tania Z. Jones (Executive Assistant).

The Forward Movement Board of Directors meets twice each year, most often in Cincinnati. The Presiding Bishop serves as president of the Board and appoints its members. Current members include the Ms. Anne Schmidt (Dallas, TX; *Chair*), the Rev. James Harlan (Palm Beach, FL; *Vice Chair*), Ms. Julie Thomas (Valrico, FL; *Treasurer*), Mr. Miguel Escobar (New York, NY; *Secretary*), Ms. Pamela Wesley

Gomez (New Haven, CT), Mr. Carlos de Jesus (Lebanon, OH), the Rt. Rev. Daniel Martins (Springfield, IL), Ms. Mimi Murley (Lake Forest, IL), Ms. Lynne Jordal Martin (New York, NY), Ms. Liz Bartenstein (Seattle, WA), the Rev. Yejide Peters (Briarcliff Manor, NY), and the Rt. Rev. Thomas Breidenthal (Bishop of Southern Ohio; *Ex-Officio*).

To learn more about Forward Movement and its work, please visit https://www.forwardmovement.org/. Early in its history, a collect for the ministry of Forward Movement was written, and we hope you will use it to pray for our ministry in the church and beyond.

> O God, we ask your guidance and blessing for the Forward Movement of your church. Use it, we pray, to open our eyes to your glory and to the opportunities that lie before the church to reach people everywhere with the good news of Christ. Grant that the leaders of Forward Movement may be both wise and daring disciples, and stir up in us the will to share joyfully in this work with our prayers and gifts. Let not our purpose grow slack, that the nations of this world may become one holy people under the kingship of God and of our Lord Jesus Christ. This we ask in His name. Amen.

Budget

The current combined annual budget is about $3 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, donations of materials, marketing and general & administrative. No funding is requested from the General Convention budget.

GENERAL BOARD OF EXAMINING CHAPLAINS

Membership

Bishops:

The Rt. Rev. Dr. Larry R. Benfield, *Chair*	Arkansas, VII	2021
The Rt. Rev. Dr. R. William Franklin, *Vice Chair*	Western New York, II	2018
The Rt. Rev. Laura J. Ahrens	Connecticut, I	2021

Clergy with Pastoral Responsibilities:

The Very Rev. Canon Michael A. Bamberger	Los Angeles, VIII	2021
The Rev. Dr. Canon Dr. Katharine C. Black	Massachusetts, I	2021
The Rev. Canon Dr. Stephen C. Holmgren	Western Michigan, IV	2018
The Rev. Dr. Adam P. Kradel	Pennsylvania, III	2021
The Rev. Dr. Danielle E. Tumminio	Massachusetts, I	2018
The Rev. Peter T. Vanderveen	Pennsylvania, III	2018

Members of Faculties:

The Very Rev. Dr. Thomas C. Ferguson	Massachusetts, I	2021
The Rev. Dr. Paula D. Nesbitt	California, VIII	2018
The Rev. Dr. Hugh R. Page, Jr.	Northern Indiana, V	2021

Lay Persons:

Dr. Elizabeth L. Anderson	Los Angeles, VIII	2021
Dr. Frederick W. Gerbracht, Jr.	Long Island, II	2018
Dr. Norma N. Givens	Upper South Carolina, IV	2021
Ms. M. Anne LeVeque	Maryland, III	2021
Ms. Janet Powers Roth	Oregon, VIII	2018

Appointments:

The Rev. Dr. J. Barrington Bates	Newark, II	2021
Dr. Barbara A. Allison-Bryan	Virginia, III	2021

Ex-Officio:

The Most Rev. Dr. Michael Bruce Curry

The Rev. Gay Clark Jennings

Executive Director, Secretary to the Board and GOE Administrator:

Duncan C. Ely, Holy Cross Episcopal Church, 150 Melrose Avenue, Tryon, NC 28782-3327

CHANGES IN MEMBERSHIP

Resignations in 2015:

The Rev. Dr. Frank G. Kirkpatrick (Connecticut, 2018)

The Very Rev. Dr. Patrick L. Malloy (New York, 2018)

Dr. Sandra D. Michael (Central New York, 2018)

Resignation in 2017:

The Rev. Dr. Duane A. Smith (Lexington, 2021)

Appointments (under Canon III.15.1) in 2016:

The Rev. Dr. J. Barrington Bates (Newark, 2021)

Dr. Barbara A. Allison-Bryan (Virginia, 2021)

The Rt. Rev. Larry R. Benfield and the Rev. Canon Michael A. Bamberger are authorized to receive non-substantive amendments to this report.

Mandate

The General Board of Examining Chaplains' [GBEC] canonical mandate [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."

Summary of Work

The GBEC's 2016-2018 triennium has been one of carrying out its canonical responsibilities:

- Continued long-range reimaging, restructuring and transforming of its processes and structures under the guidance of its board, staff, professional educational testing consultant, technology professional, and others to:
    - Improve efficiency and volunteer training;
    - Lower costs;
    - Provide a General Ordination Exam [GOE] reflecting TEC's changing needs;
    - Adhere to the latest and most professional psychometric standards for question creation and answer evaluation.

- Administered electronically an annual General Ordination Exam [GOE] at all Episcopal seminaries and at more than fifty (50) additional locations throughout the United States and abroad to:

  o 165 candidates in 2016

  o 191 in 2017

  o 175 (estimated) in 2018

- Evaluated those answers and reported the examination results and recommendations to:

  o candidates

  o diocesan authorities

  o seminary deans (about results and how their candidates compared with those from other seminaries)

- Met at:

  o Annual Meetings of October 4-7, 2016; October 3-6, 2017; and October 2-5, 2018, at Kanuga Conferences, Inc., Hendersonville, NC, to finalize and approve the GOE questions and scoring rubrics and transact other business;

  o Evaluation Meetings of February 29-March 3, 2016; February 20-23, 2017; and February 19-22, 2018, at Kanuga Conferences, Inc., Hendersonville, NC, to write evaluations of GOE answers.

- Fostered communication with constituents via website and other electronic means such as:

  o Through GBEC Chair annually to the House of Bishops;

  o Visits by Executive Director annually to nearly all Episcopal seminaries and other educational institutions with Episcopal students to meet with students, administrators and faculty.

- Managed volunteers corps by:

  o Recruiting, training, supervising and assisting volunteers in each annual cycle.

  o Utilizing annually about one hundred volunteers working electronically on:

  o Question Writing Teams

  o Field Testing Teams

  o Evaluation Teams

- Evaluated the GBEC's administration and processes (including question writing and answer evaluating) to:

  o Adapt and improve subsequent exams and procedures;

  o Improve volunteer administration and training.

- Received feedback from constituents, consultants, staff, board, other volunteers and people from the wider Church evidencing:

  o Timely distribution of GOE results;

- o High level of consistency in evaluations;

- o Efficient management;

- o Responsive communication.

- Continued to improve a dedicated website to:

  - o Impart information about the GBEC and its ministry and the GOEs;

  - o Receive nominations of people to take the GOE;

  - o Transmit GOE questions, receive GOE answers and supply results to candidates, bishops and seminary deans;

  - o Improve communication and reduce to a minimum postage and printing costs;

  - o Maintain an extensive set of Frequently Asked Questions for electronic and print distribution to:

  - o Describe the GBEC's history and purpose;

  - o Explain the GOE and its administration and evaluation;

  - o Post tips for taking the exam;

  - o Provide the past fifteen years of GOEs;

  - o Make available to candidates interactive practice GOE questions.

- Maintained Standards for each of the six canonical areas:

  - o Widely distributed them throughout TEC for feedback;

  - o Published them on the GBEC website.

- Collected and published extensive annual statistics, a very basic example of which is:

2016 Trained	Overall				M.Div. (Current/Former)				Dioc. or Locally			
Candidates	165				128				26			
	Proficient/Not Proficient				Proficient/Not Proficient				Proficient/Not Proficient			
Holy Scriptures	146	88%	19	12%	119	93%	9	7%	19	73%	7	2 7%
Church History	146	88%	19	12%	115	90%	13	10%	22	85%	4	15%
Christian Ethics	138	84%	17	16%	110	86%	18	14%	19	73%	7	27%
Practice of Min.	130	79%	35	21%	105	82%	23	18%	18	69%	8	31%
Christian Theol.	135	82%	30	18%	109	85%	19	15%	17	65%	9	35%
Christian Worsh.	130	79%	35	21%	104	81%	24	19%	17	65%	9	35%
Totals	825	83%	165	17%	662	86%	106	14%	112	72%	44	28%

2017 Trained Candidates	Overall				M.Div. (Current/Former)				Dioc. or Locally			
	191				153				22			
	Proficient/Not Proficient				Proficient/Not Proficient				Proficient/Not Proficient			
Holy Scriptures	145	76%	46	24%	122	80%	31	20%	15	68%	7	32%
Church History	176	92%	15	8%	42	93%	11	7%	18	82%	4	18%
Christian Ethics	99	52%	92	48%	81	53%	72	47%	10	45%	12	55%
Practice of Min.	160	84%	31	16%	129	84%	24	16%	16	73%	6	2 7%
Christian Theol.	160	84%	31	16%	132	86%	21	14%	16	73%	6	27%
Christian Worsh.	157	82%	34	18%	131	86%	22	14%	17	77%	5	23%
Totals	897	78%	249	22%	737	80%	181	20%	92	70%	40	30%

2018 (not available by date of submission of this report)

Comments: The GBEC and its testing consultant consider a seventy-five (75) to eighty (80) percent proficiency rate an indication of a good GOE. The actual overall average proficiency rate is eighty-three (83) percent for 2016 and seventy-eight (78) percent for 2017.

- Accepted the resignations of the Rev. Dr. Frank G. Kirkpatrick, the Very Rev. Dr. Patrick L. Malloy, Dr. Sandra D. Michael and the Rev. Dr. Duane A. Smith.
- Welcomed the Rev. Dr. J. Barrington Bates (Newark, 2021) and Dr. Barbara A. Allison-Bryan (2021).

GOALS AND OBJECTIVES FOR THE 2019-2021 TRIENNIUM

The GBEC's principal objectives during the next triennium will be to continue to fulfill its canonical responsibilities:

- Develop annually a General Ordination Examination [GOE];
- Administer it;
- Evaluate the answers;
- Report the results to candidates, their diocesan authorities and their seminary deans;
- Collate and report statistics and analysis.

In addition, the GBEC plans to continue to:

- Create examinations that will provide diocesan authorities with useful information for diagnosis and assessment of their candidates;
- Provide seminaries and dioceses with statistics about performance on the annual GOE;

- Reduce costs, leverage resources, improve efficiency, increase use of electronic technology, and respond to the needs of TEC with a professionally designed and administered GOE;

- Refine and update the GBEC website to:

    o Reflect the GBEC's transparency about its work;

    o Allow easy access to information about the GBEC and the GOE;

    o Make the electronic administration of the GOE as user-friendly as possible.

- Build relationships by:

    o Committing to board development and training;

    o Collaborating with other church-wide, provincial and diocesan groups;

    o Working with Episcopal and other seminaries and educational institutions;

    o Communicating with bishops, students and their dioceses.

- Maintain detailed and extensive statistics for every annual cycle.

Budget

The General Board of Examining Chaplains has been challenged to be self-sustaining during the current triennium. Based on actual results in 2016 and 2017 and expected results during 2018, it plans to meet that challenge. The GBEC has reduced its meetings and their attendees by eighty (80) percent and overall GBEC expenses by eighty (80) percent (and office expenses by ninety (90) percent) since the 2007-2009 triennium. In 2016, the GBEC raised the GOE fee from $500 to $750.

Description Rev.	2016-2018 GC Adopted Budget	2016 Actual	2019-2021 Rev. Sept 2017	2018 Rev. Sept 2017	2016-2018 Sept 2017
Income	(556,729)	(123,000)	(144,000)	(127,500)	(394,500)
Non-Staff	399,550	30,584	53,000	53,000	136,584
Staff	222,179	85,543	85,585	92,927	268,055
Total		(6,873)	(1,415)	(18,427)	(10,139)

Description	2016-2018 GC Accepted Budget	2016-2018 Rev. Oct 2017	2019-2021 Working Draft
Income	(556,729)	(394,500)	(395,000)
Non-Staff	399,550	136,584	178,747
Staff	222,179	268,055	305,377
Total		10,139	89,124

BOARD TRAVEL AND MEETINGS

The General Board of Examining Chaplains will meet three (3) times during the next triennium, requiring $20,000 for 2019, $20,000 for 2020 and $20,000 for 2021, for a total of $60,000 for the triennium.

INVESTIGATION OF PRISON CONDITIONS

Submitted by the Office of Government Relations and the Office of the Bishop Suffragan for the Armed Forces and Federal Ministries

Membership

OFFICE OF GOVERNMENT RELATIONS

Ms. Rebecca Linder Blachly, Director, Office of Government Relations
Ms. Lacy Broemel, Refugee and Immigration Policy Analyst
Mr. John Cobb, Domestic and Environmental Policy Analyst
Ms. Patricia Kisare, Legislative Representative for International Issues
Mr. Alan Yarborough, Office Manager and Communications Coordinator

OFFICE OF THE BISHOP SUFFRAGAN FOR ARMED FORCES AND FEDERAL MINISTRIES

The Rt. Rev. Carl Wright, Bishop Suffragan for Armed Services and Federal Ministries
The Rev. Canon Leslie Steffensen, Canon to the Bishop Suffragan for Armed Services and Federal Ministries
Ms. Maggie Mount, Administrative Assistant to the Bishop Suffragan

Mandate

Resolution 2015-D062 Investigation of Prison Conditions
Resolved, That the 78th General Convention call on the Bishop for the Armed Forces and Federal Ministries and the Office of Government Relations to investigate conditions of prisoners, parolees and probationers in the criminal justice systems of the countries which are represented in The Episcopal Church and develop a report outlining areas for advocacy and reform to the 79th General Convention.

Summary of Work

The purpose of this report is to fulfill the request in Resolution 2015-D062 to investigate "conditions of prisoners, parolees and probationers" in the United States and in other regions where the Episcopal Church has a presence in order to outline "areas for advocacy and reform." The report provides a brief overview of incarceration trends in the U.S. followed by advocacy recommendations that would address many of the most needed changes to the U.S. criminal justice system. The report also provides basic information about some of the challenges faced by non-U.S. Episcopal dioceses regarding

criminal justice and incarceration and provides recommendations where advocacy at the federal level and at the United Nations could address the systemic concerns in non-U.S. dioceses.

Over the years, General Convention has expressed strong support for criminal justice reform, in particular highlighting the need to address racial injustices throughout the system. General Convention Resolutions call for an end to mass incarceration, urge alternatives to the school-to-prison pipeline, highlight the need to ensure that disabled persons are not denied proper treatment and accommodations, encourage the removal of barriers to full and fair reentry after serving sentences and ask for support for families of the incarcerated. Resolutions also call for an end to immigrant and family detention, and call for divestment from private prisons and a moratorium to construction of maximum control prisons.

These resolutions demonstrate a clear commitment to ending mass incarceration and reforming many aspects of a broken system. Their call to action has allowed the Office of Government Relations to take on meaningful and powerful evangelism in this arena, advocating the Church's positions and goals to Members of Congress and Presidential Administrations. Individuals, parishes, and dioceses working within their communities and states complement and reinforce the work of the Office of Government Relations, particularly concerning state and municipal angles to criminal justice reform.

This report identifies areas for new General Convention resolutions that would allow Episcopalians throughout the Church to engage in advocacy to support meaningful reform efforts on mass incarceration. These recommendations are framed primarily from the federal perspective but could be adapted to subnational efforts. State and local reforms will be critical in affecting nationwide change, but the strategies, tactics and solutions will vary considerably throughout different municipalities and states. The overarching aim of these recommendations is to encourage reforms that help to create a more just and equitable system, in particular recognizing the role that racism and racial disparities play in current incarceration trends. In short, the Church seeks criminal justice reform that is aligned with our broader dedication to the creation of the Beloved Community.

Even within the narrow focus of this report, issues relating to incarceration, criminal justice, and systematic reform are often contested, requiring specialization, in-depth expertise, and resources to carry out extensive and detailed research and to understand the nuances of the debates. While the Office of Government Relations engages in advocacy and the Office of the Bishop Suffragan for Armed Services and Federal Ministries supports prison chaplaincy, the offices are not structured or mandated to undertake a comprehensive review of issues related to mass incarceration. As a result, this report is limited to a high-level overview of key issues, whenever possible, highlighting resources from universities, think tanks, public policy research centers and advocacy groups that have career experts devoted exclusively to criminal justice reform efforts.

U.S. PRISONS AND CRIMINAL JUSTICE SYSTEM

The U.S. criminal justice system is a highly decentralized patchwork of federal, state and municipal jails and prisons, governed by a Venn diagram of federal, state, and local laws, regulations, courts and correctional bureaucracies. According to the Bureau of Justice Statistics, "Jails are locally operated short-term facilities that hold inmates awaiting trial or sentencing or both, and inmates sentenced to a term of less than one year, typically misdemeanants. Prisons are longer-term facilities run by the state or the federal government that typically hold felons and persons with sentences of more than one (1) year.[1]" Conditions vary widely across states and municipalities. Different municipal, state, and federal laws and regulations lead to different impacts on incarceration, conditions, parole, and probation.

General Convention has highlighted the racial disparity in incarceration rates, and called for an end to all forms of discrimination. Indeed, minorities are incarcerated at much higher rates than whites at the national level (Figure 1), with African Americans and Hispanics making up approximately fifty-six (56) percent of the total incarcerated population in 2014[2]. In 2016, these two (2) demographics made up slightly less than one third of the U.S. population. The disparity between rates of whites and African Americans is particularly high, with African Americans being five (5) times more likely to be incarcerated than whites.[3] In addition, numerous studies have demonstrated the uneven sentences given to people of color compared to white offenders who commit the same crimes.[4]

Resolution 2015-A183 urges Episcopalians to study Michelle Alexander's 2010 book, *The New Jim Crow: Mass Incarceration in the Age of Color Blindness.* In her work, Alexander, a former civil rights lawyer, gives a powerful portrayal of what it means to be African American in the criminal justice system. Alexander demonstrates that African American communities (particularly in urban areas[5]) have been disenfranchised and denied basic rights through interactions with the criminal justice system. Alexander concludes that while "it is no longer socially permissible to use race explicitly as a justification for discrimination…it is perfectly legal to discriminate against convicted criminals." These forms of discrimination mirror forms of discrimination during the period of Jim Crow laws.[6] The recommendations emerging from General Convention in 2015 have highlighted many of the critical insights from Alexander's work, and those dioceses, congregations, schools, and other faith communities who have not yet studied the book would benefit from doing so. Given the extent of resolutions that already incorporate many of Alexander's recommendations, this report identifies new areas for advocacy, with the understanding it is imperative Episcopalians continue to advocate for the reforms laid out by General Convention, in particular Resolution 2015-A011. This Resolution includes fourteen (14) possible initiatives, including the following advocacy recommendations:

- Advocating for alternatives to incarceration for those who are addicted, and increased funding for treatment programs;

- Advocating for alternatives to incarceration for those who are mentally ill, and increased funding for treatment programs;

- Advocating for protection of the civil rights and provision of appropriate support and accommodation for people with disabilities who are arrested and incarcerated;

- Advocating for funding for job training and apprentice programs for those who are at risk of incarceration and those who are formerly released from prison;

- Advocating for the repeal of mandatory-minimum sentences for nonviolent offenses;

- Calling for the abolition of the sentencing disparity between crack-cocaine and powder-cocaine offenses and, as an intermediate step, urging 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;

- Advocating to eliminate "three strikes" sentencing protocols;

- Joining local "Ban the Box" campaigns to remove questions about arrest records in on-line and written job application forms;

- Opposing the creation of "for profit" prisons and immigration detention centers, and, where they exist, organizing against guaranteed nightly numbers of prisoners and detainees, and advocate for access to education and rehabilitation programs for those being incarcerated or detained;

- Reforming monetary bail bond 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;

- Advocating for immediate return of the right to vote for those who have served their sentences and left prison;

- Calling for the exploration and creation of restorative justice programs to transform juvenile justice systems.

These continue to be critical areas in need of reform, and Episcopalians, parishes, dioceses, and Church center staff should continue to reference and advocate on these issues that have already been identified as priorities.

SCHOOL-TO-PRISON PIPELINE

The Episcopal Church has sought to address the negative impacts of the school-to-prison pipeline, an effort highlighted in General Convention Resolution 2015-D068. The trend of children encountering the criminal justice system at a young age means that many will have a higher likelihood of incarceration, often with highly disproportionate impact on communities and children of color. If schools respond to, in some cases, routine adolescent misbehavior by children and teenagers through

a law enforcement lens, children are not well served. Zero tolerance policies for fighting or the criminalization of truancy turn fairly routine teenage misdeeds into criminal matters. Rather than working to teach, mentor and transform misbehaving teenagers into productive adults, these policies start a domino effect that often ends in prison. While there are tragically serious threats and justifications for law enforcement to be in schools, communities must be careful not to criminalize school disciplinary issues, as these decisions can have a profound impact on a child's future.

Disciplinary issues should be addressed as much as possible through mediation, counseling, and education. Schools should focus on educating and reforming children rather than criminalizing their adolescent mistakes. Criminalization sets a chain of events that leads to children missing their education and as a result facing a future that too often follows cyclical problems that lead to incarceration. This cycle disproportionately affects children of color in public school systems. Due to the strong policies of General Convention, Episcopalians are engaged in advocacy on this critical topic, though considerable work remains at state capitols and on school boards across the country.

POVERTY AND INCARCERATION

Incarceration also disproportionately affects low-income Americans. Indeed, the Prison Policy project determined that, "in 2014 dollars, incarcerated people had a median annual income of \$19,185 prior to their incarceration, which is 41% less than non-incarcerated people of similar ages.[7]" This divide also cuts across race, ethnicity, and gender—all incarcerated groups had lower pre-incarceration incomes than their non-incarcerated peers in the same demographics. This demonstrates that the criminal justice systems often traps people in a cycle of poverty, not just as they come out of prison and struggle to find work, but prior to incarceration as well. General Convention policies that call on the Church to address poverty – through access to healthcare, progressive taxation and a social safety net, are also a critical component of reducing incarceration rates and helping communities with the highest rates of incarceration. The Church is already aware of the need to provide support to the most vulnerable – when it comes to incarceration, this is not only those who are formerly incarcerated, but low-income people who are also at risk.

PRE-TRIAL DETENTION AND BAIL

Pre-trial detention is a significant component of the U.S. correctional system, estimated to be around seventy (70) percent of the entire local jail population (see figure 2). Pre-trial detention is the "detaining of an accused person in a criminal case before the trial has taken place, either because of a failure to post bail or due to denial of release under a pre-trial detention statute."[8] Many see pre-trial detention as unjust and contrary to the Constitution's Presumption of Innocence clause in the Sixth Amendment, which declares that individuals be presumed innocent until proven guilty. Pre-trial detention can negatively affect almost all aspects of an accused individual's life such as employment, housing, child custody or access to adequate healthcare. While crime rates are at historic lows[9], the number of accused in pre-trial detention has steadily increased, contributing to a consensus among

criminal justice professionals - including the American Bar Association, the International Association of Chiefs of Police, the Association of Prosecuting Attorneys, and the American Council of Chief Defenders - that reform must take place.[10]

Traditionally, it is argued that those who present a flight risk or who pose a threat to public safety should not be released on bond or bail. However, reports[11] have noted that many inmates detained could be released as they pose neither a flight risk nor real threat to public safety. Furthermore, many studies have shown African Americans and Hispanics are "more likely to be detained pretrial than white defendants and less likely to be able to post money bail as a condition of release."[12] Critics note that excessive bail levels can prove to be disastrous for defendants, causing cyclical financial devastation on them and their families. In addition to loss of income, employment, inability to pay rent and associated impacts on their families; those detained prior to trial face the stigma of being incarcerated, even if found innocent, well after they are released.

Consensus has grown around the understanding that a monetary-based bail system is unjust and discriminatory. The Church formally recognized this through General Convention Resolution 2015-A011. The Resolution calls for reform of "monetary bail bond 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."[13] Many within the Episcopal Church have advocated for the urgent need to reform this system, which discriminates against low-income Americans and people of color, resulting in a two (2) tiered system of justice: one for the wealthy and another for those without sufficient means to make payments.

SENTENCING REFORM

Sentencing reform, in particular eliminating mandatory minimum sentences for nonviolent drug offenders, is often seen as the primary way to reduce prison populations. Historically, sentencing and mandatory minimums have disproportionately impacted people of color and lower socioeconomic status. Perhaps most notably, the Fair Sentencing Act [FSA], passed in 2010, sought to ease the disparity of sentencing between crack and powder cocaine. The American Civil Liberties Union [ACLU] reported that before the FSA was instituted, the disparity between crack and powder cocaine was 100:1 and after FSA's implementation is 18:1.[14] Critics frequently characterized the disparity as an example of structural racism as the vast majority of those imprisoned for crack-cocaine use are African American while those imprisoned for powder cocaine are predominately white. There have been ongoing efforts since the FSA's inception to make the bill retroactive, most recently being the Smarter Sentencing Act of 2017, which is, as of September 2017, in the Senate Judiciary Committee. Ultimately, due to the majority of prisoners being held below the federal level, these efforts, while critically important, will affect only a small portion of the total population across the various prison systems in the U.S.

Some researchers have highlighted that nonviolent drug offenses and mandatory minimum sentences are not the sole reason for the growth in the U.S. prison population and critique narratives that overemphasize mandatory minimums and private prisons as the cause for growing incarceration rates. For instance, drug offenders make up roughly twenty (20) percent of the prison population [15] (see figure 3), while violent offenders in the prison population are roughly fifty (50) percent[16]. Researchers have pointed to the need to address violent crime, which is an especially politically challenging issue and area for reform. Indeed, many politicians are willing to consider reducing or eliminating mandatory minimums and to make other concessions for non-violent offenders, but only by offsetting with increased levels of sentencing for those convicted of violent crimes.

It is important to note that while violent crime is frequently reported and politicized, violent crime rates in the United States have dropped over the past quarter century. Both an annual report by the FBI and a report commissioned by the Federal Bureau of Justice Statistics confirm that there has been a "substantial drop" in the violent crime rate since the peak in the early 1990s. Nevertheless, rates remain high and are a contributing factor to high incarceration rates in the U.S.

PRISON MANAGEMENT CHALLENGES

Given the diverse and decentralized nature of prisons throughout the U.S., physical conditions vary widely and reporting is inconsistent and decentralized. For many municipalities, states and federal facilities, several common challenges emerge such as overcrowding, violence and inhumane treatment of prisoners. Across all levels of prison systems in the U.S., the most common challenge is overcrowding. Following the 2014 fiscal year, the U.S. Government Accountability Office [GAO] produced a report acknowledging the aging infrastructure of the Bureau of Prisons [BOP]. The report cited that around 1/3 of BOP's one hundred and twenty-one (121) facilities are fifty (50) years or older.[17] Additionally, the BOP was faced with a backlog of more than two hundred and twenty (220) major repair projects.[18]

While significant debate continues over the need for new prison construction and methods to reduce overall population within prisons and jails; the government has a moral responsibility to ensure that prisons are safe, not overcrowded, and that those who are incarcerated have services, facilities and healthcare that meet certain standards. To fulfill this, facilities must be funded to keep up with routine maintenance, operate at capacity, provide proper training and provide the services necessary to not only care for but also to rehabilitate prisoners. Resolution 2015-A011 addresses much of this in calling for sufficient funding for drug rehabilitation, disability rights, training programs and other necessary services.

MENTALLY ILL IN THE PRISON SYSTEM

Resolution 2015-A011 highlights a particularly important issue in calling for proper care and treatment for those inmates with mental health needs. One of the main concerns of prison administrators is the

lack of resources in detention facilities to treat and house the disproportionate number of prisoners that suffer from some form of mental illness. Nationally, about one third of inmates receive psychiatric treatment and some industry experts believe that number could be underreported as some go without diagnosis or treatment. With such a significant portion of inmates in need of specialized mental health treatment facilities, prisons are often under prepared in both professional staffing and specialized facilities for those requiring care.

In keeping with the Resolution, the Office of Government Relations and Episcopalians across the country recognize that the proper care for those individuals incarcerated with mental illnesses, is a critically important area for advocacy. Easily acknowledged as a contributing factor to many criminal activities, inmates are entitled to healthcare; including mental health services, while under the care of the state. The intersection of mental health and the criminal justice system is best represented by the Los Angeles County jail system, which has become the nation's largest mental health facility.[19]

Community advocacy cannot be limited to ensuring the appropriate treatment while inmates are wards of the state. Inmates receiving mental health treatment must be cared for during and after their re-entry into the community. While the state is responsible for treating inmates under its care, these efforts are futile if patients abruptly lose access to treatment upon release. Failure to ensure the continuation of treatment after release is not just immoral but a profound abdication of the public interest as financial investment in treatment during incarceration is lost and the potential for recidivism increased.

SUPPORT WORKFORCE DEVELOPMENT AND EDUCATION

A critical area for public investment and advocacy is the emphasis placed on workforce training and educational services provided to prisoners. Similar to mental health, preparation with the skills necessary to earn an honest and self-supporting wage are critical to allowing people the opportunity to change their lives. If a young man is incarcerated for a non-violent crime at twenty (20), taught no useful skills, not kept up to date with technological developments, and only familiar with criminal sources of income; he cannot be reasonably expected to succeed when released at age thirty-five (35). Given that the cost of community college tuition is often lower than a year of imprisonment, teaching prisoners useful skills and trades will not only prepare them for successful employment after release but also save money through lower recidivism rates.

Another area for local and state advocacy is the issue of licensing for trades and professions. In many jurisdictions, former prisoners are not allowed to be certified for positions. While some prohibitions are justified (for example, a person convicted of insurance fraud likely should not become an insurance agent) some are punitive or just contradictory. Often when wildfires require a state to seek additional staff to fight the fires, the state calls upon prisoners to provide assistance. Yet upon release, their criminal record prohibits them from servicing as regular firefighters. Felons face particular challenges

in finding employment since discrimination against them for employment is, in many cases, legal. This can lead to felons being unable to meet employment requirements of their parole or falling victim to unscrupulous employers exploiting their vulnerability. General Convention Resolution 2015-A011 established the Church's position in support of these programs and inspires significant efforts at every level of the Church and criminal justice system.

REFORM EFFORTS

Public concern and calls for reform have grown as our nation continues to grapple with the devastating impact of such high incarceration rates. Unfortunately, despite public support, Congress has not enacted the kinds of large-scale legislative reforms that we needed. The 114th Congress (2015-2016) developed significant legislation to reform 1990's era mandatory minimums and other aspects of the criminal justice, sentencing, and reintegration systems at the federal level. Unfortunately, while the legislation passed out of Committee, it was considered too controversial to take up during the 2016 election. Several pieces of legislation have been re-introduced in the 115th Congress (2017-2018), in particular, sentencing reform, corrections, and incarceration of minors may be able to move forward. Advocates, including the Office of Government Relations, began work in the summer and into the winter of 2017 to build support for these bills in anticipation of an opportunity for their passage in early 2018.

In recent years, reform efforts have focused not only on reducing the prison population but also on addressing the school-to-prison pipeline, both areas where minority populations are overrepresented. The alliance of advocates working on criminal justice reform have included fiscal conservatives, who object to the high costs; libertarians, who oppose drug laws responsible for many inmates' sentences; and those who generally seek a more restorative judicial approach.

ADVOCACY RECOMMENDATIONS

As previously noted, General Convention has spoken powerfully on various aspects of the criminal justice system and the need for reforms, from the pastoral and ministry perspective as well as highlighting areas for advocacy and systemic change. Below are recommendations where the Episcopal Church could meaningfully engage, where there is not yet General Convention policy. Given the complexity of the system, any advocacy efforts must address the issue of prison conditions and criminal justice reform more broadly at the local, state and federal level.

- Recognize the growing percentage of incarcerated women
    - While women make up less than ten (10) percent of the U.S. prison population, they are currently the fastest growing demographic of the jail population.[20] For reference, in 1970, only eight thousand (8,000) women were in jail, yet by 2014, that number was up to one hundred and ten thousand (110,000).[21] The vast majority of these women are in jail for nonviolent offenses, a very different reality from the male population.[22]

Because of these findings, questions have emerged surrounding how the criminal justice system is sentencing women in comparison to men as the majority of women are also behind bars with low-level offenses. Disparities in race exist amongst women too, as African American women are two (2) times more likely to be imprisoned than white women are.[23] Women are also more likely to be held in jails as opposed to prisons.[24]

- o General Convention has not addressed this issue, beyond a 1988 resolution highlighting abuses at a particular facility.[25] Resolutions recognizing the particular needs of incarcerated women, as well as investigation into unjust sentencing or racial disparities, could be key areas of new policy.

- Eliminate or drastically reduce the use of solitary confinement

    - o Solitary confinement is cruel, inhumane and has been shown to cause mental illness in some cases.[26] The UN Special Rapporteur Juan Menendez has called for a ban of any form of segregation more than fifteen (15) days, and advocates the use of solitary be banned entirely for those with mental disabilities and children.[27] A recent report, Seeing into Solitary, compared the use of solitary in thirty-five (35) jurisdictions globally and found that the U.S. is among the most punitive in its use of isolation.[28] Estimates range between eighty thousand (80,000) to one hundred thousand (100,000) inmates are held in solitary confinement at any given time.[29] Efforts to eliminate and drastically reduce solitary must also recognize the safety of guards and fellow inmates, and the concerns within the corrections community about the need to cope with those who have demonstrated they have the potential to harm themselves or others.

    - o While General Convention has policy condemning torture, there is not specific language on solitary confinement. The Office of Government Relations, in collaboration with the National Religious Campaign Against Torture [NRCAT], will feature a solitary confinement virtual reality experience at the exhibit hall during General Convention 2018 in Austin. Additionally, guest speakers, who were formerly in solitary, will speak at a brown bag luncheon to educate those at General Convention about the issue and experiences of those who have survived solitary and the steps that can be taken to address its pervasive use.

- Participate in local elections for judges and prosecutors.

    - o In his recent book *Locked In*, Jonathan Pfaff argues that more than any other single cause, prosecutorial discretion accounts for the rise in the U.S. prison population. The political consequences for leniency are often harsh, whereas there can be few political consequences for absurdly harsh punishments and charges. Prosecutors and judges running for re-election or for higher office want to be seen as tough on crime. Engaging in your local elections are important in successfully changing this rhetoric.

- o General Convention has not addressed this critical component of incarceration rates, and the consequences of politicians feeling that they need to be tough on crime, above all other concerns.

- Oppose Collateral Punishment

  - o Many challenges face citizens who are attempting to rejoin society after serving their sentences. While society should have an obligation to welcome and help returning citizens adjust and become productive and positive neighbors, legal and regulatory systems that are in place often prevent this. Many of these rules can divide families even after incarceration, limit job prospects, education opportunities and result in the demoralization and eventual recidivism by those with the best of intentions upon release.

  - o At the federal level, many returning citizens are barred from social welfare programs. One such example applies to those convicted of felony drug crimes. Upon release, they are not allowed to live in federally supported public housing. As a result, if a former inmate's only family live in public housing they are unable to live with them or if they cannot afford market-based rent (due to discrimination stemming from their prison sentence) they cannot live in public housing on their own. The result is that even after being released individuals can find themselves legally separated from their families. This divides them from support networks and makes the process of building a life even harder. Further federal restrictions can prevent returning citizens from accessing food assistance or some student loans further hindering their development into independent and positive members of their community.

  - o Additionally, there are many employment discrimination rules that seemingly serve no purpose other than continuing to punish people after they have served their punishment. While these rules are set by state or local governments, it is not uncommon for those with certain criminal records to be prohibited from serving their communities as firefighters or working in a small business as a barber. While it is reasonable that a person convicted of insurance fraud should not be employed at an insurance agency, the idea that a criminal record makes one unfit to rescue people and homes from a fire is unjustifiable – particularly since prisoners are often called upon to assist in battling wildfires.

  - o Another collateral punishment and insult returning citizens regularly face is the denial of their voting rights and having to declare their former mistakes on employment applications. The Episcopal Church has opposed such efforts, including formally declaring its position through General Convention Resolution 2015-A011, though many of the broader and indirect collateral punishments, which vary with time and location, are not covered by the specific statements of Resolution 2015-A011.

- Encourage evidence-based policies to address and reform the criminal justice system

- One of the most effective actions Episcopalians can do is to demand data, evaluations, and constant effort to improve the delivery of justice within their communities. It is too easy for bad criminal justice policy to go unnoticed, so we must actively choose to go and see it. Choosing to be engaged and to witness the implementation and impacts of our judicial system requires not only ministering to prisoners but demanding public officials become literate and engaged in criminal justice studies and constant improvement.

- Recognize the need to address violent crime

  - While a great deal of energy is focused on sentencing reform, mandatory minimums, and ending discrimination against those formerly incarcerated, the need to address violent crime is also essential, although politically challenging. Reform and advocacy efforts looking at restorative and rehabilitative justice are also a critical piece of any comprehensive reform efforts.

  - A resolution from 1985 highlights the need to address violence, but updated language on violent crime in particular, recognizing the harm it does to communities but also the need for rehabilitation, is critical.[30]

PRISON CONDITIONS OUTSIDE OF THE U.S.

Prisons and criminal justice systems throughout the non-U.S. diocese of The Episcopal Church face many similar challenges, including needing to address systemic racism, prison overcrowding, corruption, and violence. Aging facilities, physical and emotional abuse, and in some cases lawlessness, plague many facilities across the world. Acknowledging the various complexities that are sure to exist in each facility, this section hopes to give a brief overview on some of the challenges facing prisoners across non-U.S. dioceses.

While it may be unfair to compare any specific region or territory, overcrowding is one of the primary problems that appears to be facing almost all communities ranging from the most developed communities to the least. Similar to the U.S., the availability and consistency of data and third party analysis hinders the ability to understand problems and propose solutions in many circumstances.

NON-U.S. EPISCOPAL DIOCESES

Recent studies and news reports[31] have documented the horrifying conditions in Venezuela's prisons. Prolonged incarceration, political detention and the lack of a functioning criminal justice system mean that Venezuelans who are arrested can disappear without any communication to their families or loved ones, often languishing in prison for years. Inmates are frequently physically abused or tortured, and civilians are regularly tried by military tribunals. According to Human Rights Watch:

Corruption, weak security, deteriorating infrastructure, overcrowding, insufficient staffing, and poorly trained guards allow armed gangs to exercise effective control over inmate populations within prisons. The Venezuelan Observatory of Prisons, a human rights group, reported that 6,663 people died in prisons between 1999 and 2015. As of July, average overcrowding of 210 percent plagued Venezuelan prisons, according to the Observatory.[32]

Prisons in Haiti are severely underfunded and overcrowded with inmates highly susceptible to disease. According to an AP investigative report earlier this year, eighty (80) percent of Haitian inmates are held in "prolonged pretrial detention waiting for their chance to see a judge."[33] As a result, Haitian health experts are reporting that Haitian prisons' "rate of preventable deaths" is at an all-time high with twenty-one (21) inmates dying in the span of just one (1) month earlier this year. The overcrowding is the worst in the world, with the University of London's Institute for Criminal Policy Research recording a four hundred and fifty-four (454) percent occupancy level. The U.S. State Department has worked in recent years to provide support to Haitian correctional staff with training and funding. The Bureau of International Narcotics and Law Enforcement Affairs [INL] has also funded the construction of three (3) new prisons and local jails, meant to address the widespread issue of overcrowding.[34] These conditions are in part compounded by the loss of infrastructure resulting from the 2010 earthquake.

A report conducted earlier this year by the UN, human rights officials casted light on the overcrowding in Taiwan's prison.[35] As of 2015, the prison population in Taiwan exceeds capacity by thirteen (13) percent. Since the report, the country's Corrections Director has promised increased rehabilitation and more facilities in order to eliminate overcrowding in the short term.[36] The overcrowding is largely attributed to the rising number of drug offenders incarcerated each year.

Colombia has struggled to ensure humane prison conditions. In 2017, the country's watchdog called for the closure of two (2) Colombian prisons where overcrowding had turned into a humanitarian crisis.[37] The two (2) respective prisons were four hundred and fifty-two (452) percent and two hundred and eighty-three (283) percent over capacity according to *El País*. The problem is attributed to the more than ninety-three thousand (93,000) hearings backlogged in a broken Colombian justice system.

Both inmates and faith-based ministries have frequently described prisons in the Dominican Republic as harsh.[38] As of March 2017, capacity is currently one hundred and eighty-eight (188) percent with up to sixty-four (64) percent of those prisoners being in pre-trial detention.[39] The Dominican Republic is also home to the prison, La Victoria, a "historically crowded" prison, where rule is frequently questioned due the consistent instances of violence.[40] Disease is prevalent and sanitary conditions are generally poor, exacerbated by the fact that inmates are frequently forced to sleep "on the floor because there were no beds available."[41] In 2015, the U.S. Embassy of the Dominican Republic reported

that while the Director General of Prisons claimed that all inmates received three (3) meals a day, many inmates turn to their families in order to be properly fed.

The government of Ecuador invested millions of dollars in 2012 for the construction of new correctional facilities to combat its historical problems of overcrowding and poor conditions. Yet, according to a human rights report conducted by the U.S. State Department, in spite of the improvements, inmates and human rights groups cited instances that inmates families were expected to deliver food and medication to the prison.[42]

The national prison and jail complex in Honduras has an official capacity for eight thousand six hundred (8,600) inmates,[43] yet there are estimates that nearly seventeen thousand (17,000) inmates are currently behind bars.[44] In response the extreme overcrowding of its prison system, the Honduran government has indicated they would like to begin the construction of "mega prisons" in rural areas of the country, which has left many advocates concerned that this will further affirm the rising rate of inmates in the country. In a 2014 report, the U.S. government, pointed to "judicial inefficiency, corruption and insufficient resources" as one of the main issues in the number of inmates in pre-trial detention (approximately fifty (50)percent).[45] As a result, many prisoners are forced to stay behind bars well after their acquittal or completed sentences because officials aren't able to process court orders fast enough.

Many European countries have prisons with better conditions, more accountability, and lower rates of recidivism than the U.S., but many countries still suffer from racial disparities in prison populations as well as challenges with capacity and violence. Further, there have been concerns about police abuse of power in response to an uptick in terrorism. In the United Kingdom, the prison complex has been under fire after Chief Inspector of Prisons, Peter Clarke released a report detailing a significant increase in violence, and a deteriorating state of facilities lacking staff.[46]

France is going through a unique issue with their prison population as they continue to deal with the fear of radicalized Islam spreading in their prison system. In recent years, many French prisons have decided to separate "radicalized" Islamists in fear of radicalized doctrine "contaminating" other inmates. While the French government is not allowed to record religious affiliations of inmates it is estimated that forty (40) to fifty (50) percent of inmates are Muslim.[47] Some have called for France to institute full-time Muslim clerics in prisons as way to combat radicalized teachings.[48]

ADVOCACY RECOMMENDATIONS FOR PRISONS OUTSIDE OF THE U.S.

In terms of addressing the particular challenges facing these dioceses, extensive knowledge of the criminal justice system and understanding of the mechanisms for change is essential. Advocacy can still be a key component of making change, however, such as highlighting abuses when the international media would otherwise miss them, and bringing attention to particular cases. Further,

the following broad-based recommendations about U.S. pressure and international and multilateral institutional engagement may direct those working to advocate to improve the conditions for prisoners.

- Continue to work through multilateral international bodies to advocate for the protection of human rights for all people.

- Support organizations such as Human Rights Watch and Amnesty International that document and bring to light abuses in prisons and detention centers.

- Engage the U.S. State Department to exert diplomatic leverage to ensure foreign countries invest in reforming criminal justice systems and prisons. Encourage support for training and capacity building.

- Encourage advocacy from Episcopal bishops and companion dioceses for each respective countries

- Use preexisting companion diocese relationships to highlight candidates.

EPISCOPAL CHURCH POLICY

- Resolution 2015-A011 - Urge Advocacy for Policy Changes to End Mass Incarceration Practices
- Resolution 2015-D068 - Support Ministries Against the School-to-Prison Pipeline
- Resolution 2015-D032 - Reaffirm Disabled Persons' Rights in the Criminal Justice System
- Resolution 2015-D067 - Divest from Private Corporations in the Prison Business
- Resolution 2012-A077 - Develop a Model Prisoner Ministry
- Resolution 2012-D026 - Urge Support for Bipartisan U.S. Commission on Criminal Justice
- Resolution 2012-B004 - Promote Alternative to the School-to-Prison Pipeline
- Resolution 2012-B004 - Reaffirm Commitment to Support Camps for Children of the Incarcerated
- Resolution 2009-C075 - Assist Dioceses in Establish Camps for Children of the Incarcerated
- Resolution 2006-D012 - Establish Summer Camp for Children of Persons in Prison
- Resolution 2003-A125 - Establish Ministries to Assist Prisoners and Their Families
- Resolution 2003-A125 - Promote Juvenile Justice Reform
- Resolution 2000-B003 - Endorse the Study of Restorative Justice in the Criminal Justice System
- Resolution 2000-B055 - Reaffirm Criminal Justice System Reform
- Resolution 1994-D035 - Support Ministry to the Incarcerated
- Resolution 1994-D087 - Encourage Parishes to Minister to Newly Discharged Inmates
- Resolution 1994-D010 - Request Moratorium on Construction of Maximum Control Prisons
- Resolution 1988-C037 - Request Federal Funding of Substance Abuse Programs

FURTHER RESOURCES

- o National Religious Campaign Against Torture[49]
- o Starter Kit for Teaching and Learning on Mass Incarceration[50]
- o Stop Solitary for Kids Campaign[51]
- o National Alliance on Mental Health[52]
- o Prison Policy Initiative[53]
- o Vera: Institute of Justice[54]
- o Human Rights Watch[55]
- o The Brennan Center[56]
- o The Prison Fellowship[57]
- o Kairos Prison Ministry Fellowship[58]
- o Amnesty International[59]
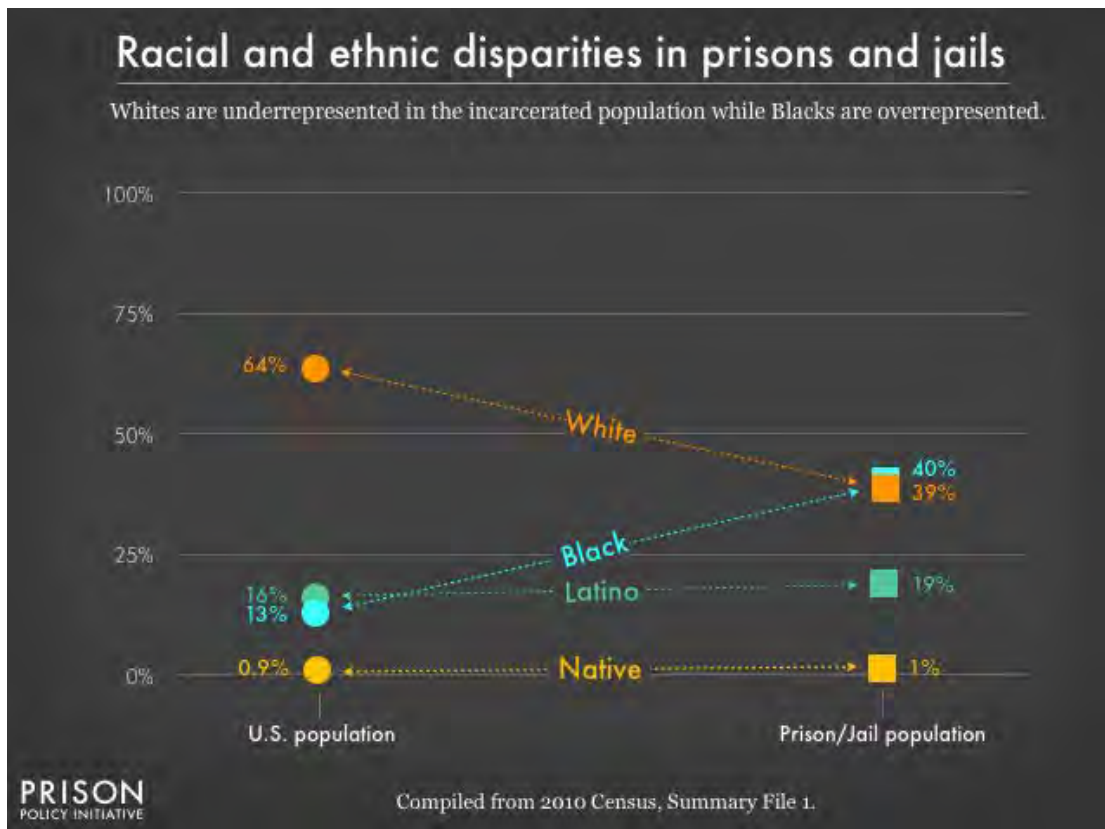
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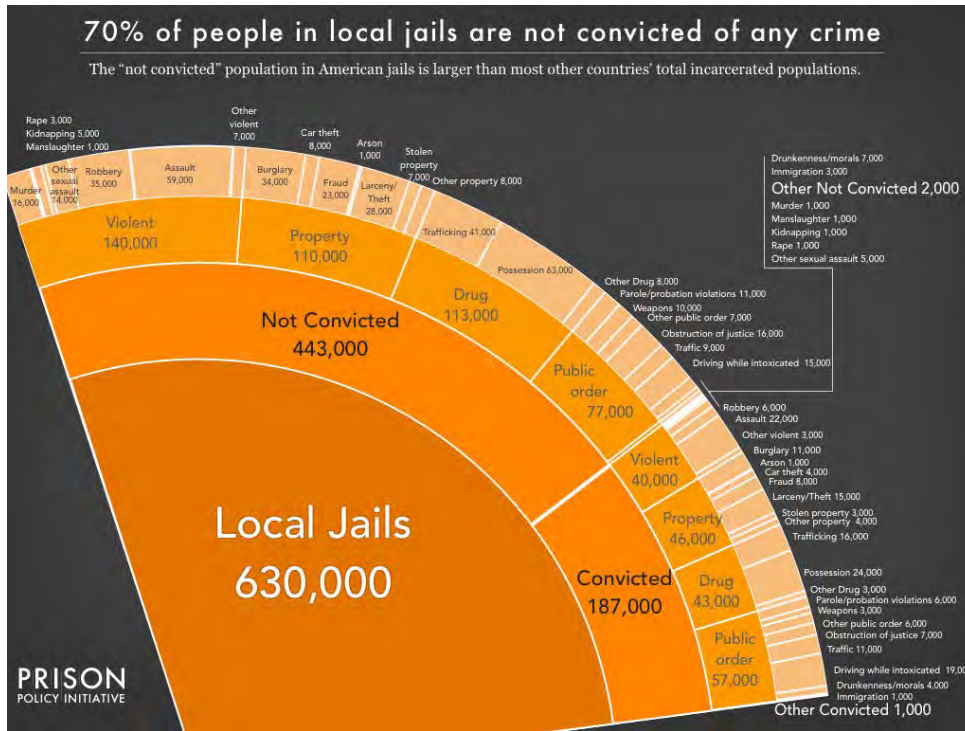
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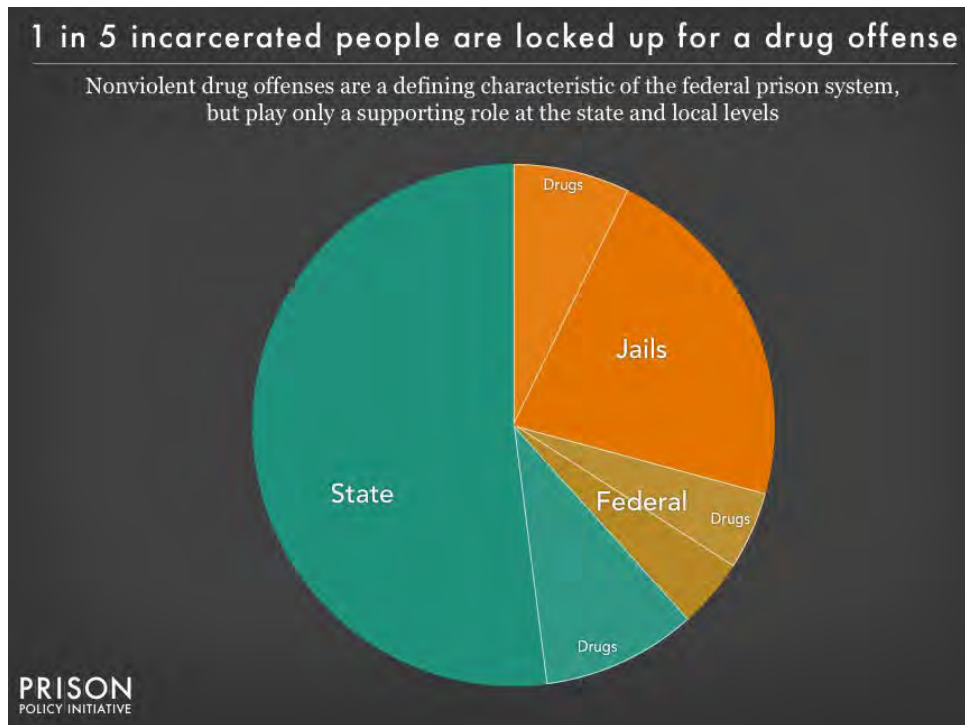
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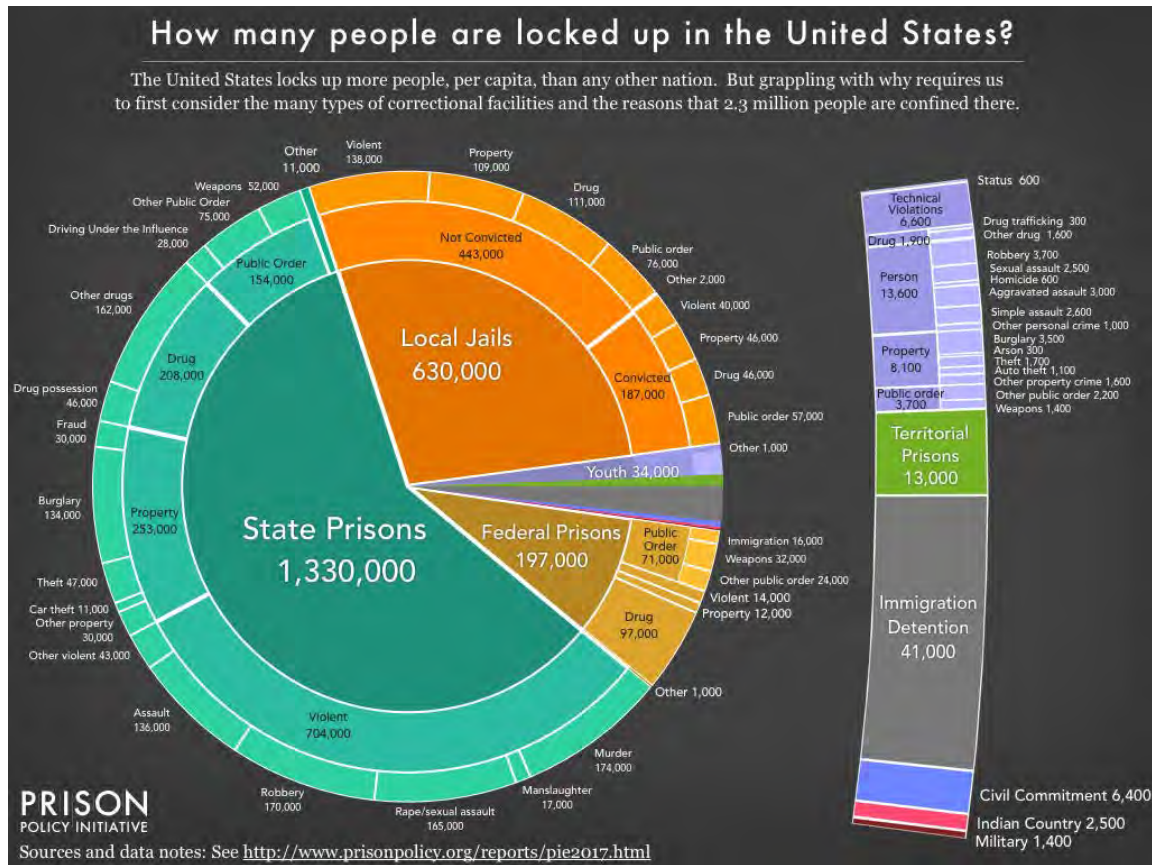
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C019 OFFICERS GROUP CHARGED WITH RESPONSE TO RACIAL INJUSTICE

Membership

The Most Rev. Michael Bruce Curry	North Carolina, IV
The Rev. Gay Clark Jennings	Ohio, V
The Rev. Canon Dr. Michael Barlowe	California, VIII
Mr. N. Kurt Barnes	New York, II
The Rt. Rev. Mary Gray-Reeves	El Camino Real, VIII
The Honorable Byron Rushing	Massachusetts, I
The Rt. Rev. Dean E. Wolfe	New York, II

Staff:

Ms. Heidi J. Kim	Olympia, VIII
The Rev. Canon Stephanie Spellers	Long Island, NY, II
The Rev. Canon E. Mark Stevenson	Louisiana, IV
The Rev. Charles A. Wynder, Jr.	Massachusetts, I

CHANGES TO MEMBERSHIP

Secretary of the House of Deputies, the Rev. Canon Dr. Michael Barlowe was appointed immediately after General Convention. The Treasurer of General Convention, Kurt Barnes joined the group at the end of 2016. Bishop Dean Wolfe resigned his post in the House of Bishops and withdrew from the C019 Officers Group in January 2017.

Mandate

"That the Presiding Bishop, President of the House of Deputies, Vice President of the House of Bishops, and Vice President of the House of Deputies be charged to lead, direct, and be present to assure and account for the Church's work of racial justice and reconciliation."

Summary of Work

With the passage of Resolution 2015-C019 Work for Racial Injustice and Reconciliation, the 78th General Convention called the whole Church to take on the ministry of racial justice, reconciliation and healing. It also allocated $2 million and – almost as important – called the Church's top leadership to share responsibility for this critical work.

In February 2016, the Presiding Officers of the House of Bishops and House of Deputies (known hereafter as "The C019 Officers Group") met in Austin, Texas, to follow through on that charge. Supported by staff members serving in the area of reconciliation and justice (Canon Stephanie Spellers, Ms. Heidi Kim, Rev. Chuck Wynder, as well as Canon Mark Stevenson, Ms. Tara Holley and Ms. Rebecca Blachly) and with wise counsel from Dr. Catherine Meeks, Ms. Diane Pollard, Dr. Cynthia Copeland and Brother Reginald Martin, the Presiding Officers shared their own gifts and stories, explored the Church's historic and current activities, and began to discern a way forward. Rather than proceed with quick fixes or an instant program, they adopted two (2) essential practices: deep listening to stories and patient commitment to mutual transformation over the long haul.

The officers also paid close attention to legislation relevant to the Church's work of racial reconciliation and justice, particularly the following:

- Resolution 2015-C019: Work for Racial Justice and Reconciliation (Establish Response to Systemic Racial Injustice)

- Resolution 2015-A011: Urge Advocacy for Policy Changes to End Mass Incarceration Practices (Recommit to Criminal Justice Reform and Study)

- Resolution 2015-A024: Direct Dioceses to Examine the Impact of the Doctrine of Discovery

- Resolution 2015-A182: Address Systemic Racial Injustice (Using Education, Community Dialogue and Internal Audit to Respond to All Forms of Racial Injustice)

- Resolution 2015-A183: Encourage Study of the Issue of Mass Incarceration (Recommended Book Study of the Triennium: "The New Jim Crow: Mass Incarceration in the Age of Colorblindness")

- Resolution 2015-A302: Express Sorrow and Solidarity to Emmanuel AME Church, Charleston, SC (Letter of Condolences to Emanuel AME Church, Charleston, SC)

- Resolution 2015-C028: Utilize Available Background Resources in a Search Process (Disclosure of Criminal Records)

- Resolution 2015-D039 Send Delegation to AME Symposium on Race

- Resolution 2015-D040: Develop Anti-Racism Youth Ministry Curriculum (Create Youth Anti-Racism Curricula)

- Resolution 2015-D068: Support Ministries Against the School-to-Prison Pipeline (Dismantling School to Prison Pipeline)

On March 12, 2016, the C019 Officers Group communicated their initial direction with the House of Bishops, the House of Deputies and the wider Church. In particular, they suggested developing the following:

- Vehicles for sharing stories, developing relationships, and listening to the Other

- Age-appropriate formation and education opportunities for dismantling racism

- A summary of the Church's current ministries and gifts for racial justice and reconciliation

- A census or audit to gain a clearer understanding of the Church's demographic make-up and its historic and current participation in systems of racial injustice

- Gathering for listening with the wider Church, our neighbors and eventually including partners in the Global South

The Officers Group spent the rest of 2016 and beginning of 2017 listening, learning and discerning, again in close partnership with the Presiding Bishop's staff and in conversation with Executive Council

(especially the Standing Committee on Advocacy and Networking), institutional leaders, and networks across and beyond The Episcopal Church.

In February 2017, the C019 Officers Group approved a draft comprehensive strategic vision, including a program budget detailing the $2 million allocation. The House of Bishops and other key leaders offered feedback over the next three (3) months. The final vision – titled "Becoming Beloved Community: The Episcopal Church's Long-term Commitment to Racial Healing, Reconciliation, and Justice" – was then presented to the Church in May 2017.

Hundreds of Episcopalians participated in a May 16 webinar where the heads of the House of Bishops and House of Deputies together introduced the long-term vision and welcomed Episcopalians to join them in a comprehensive approach to racial healing and justice. That vision is presented via the following image, known as the "Becoming Beloved Community Labyrinth":

BECOMING BELOVED COMMUNITY

THE EPISCOPAL CHURCH'S LONG-TERM COMMITMENT TO
RACIAL HEALING, RECONCILIATION AND JUSTICE

Telling Our Truth
about Our Churches and Race
Who is included and excluded?
What things have we done and left
undone regarding racial justice and
healing in the church?
via
Census and Audit

Repairing the Breach
in Institutions and Society
What social institutions and systems
are broken? How will we participate in
the repair, restoration, and healing of
institutions and systems?
via
Criminal Justice and Re-entry Ministries
Immigration and Refugee Reform
Partnership with Episcopal HBCUs

Proclaiming the Dream
of Beloved Community
What is the story of race and the vision of
Beloved Community in the wider communities
we inhabit? What collective commitments and
behaviors will foster healing, reconciliation
and justice?
via
Sacred Listening & Learning Engagements

Practicing the Jesus Way
of Healing and Reconciliation
How will each of us learn to be reconcilers,
healers, and justice-bearers? How will we
share stories and grow relationship across
dividing walls and seek Christ in the other?
via
Beloved Community Story-sharing Campaign
Multilingual, All Ages Formation and Training
Pilgrimage and Retreats
Liturgical Resources

In August 2017, the Presiding Bishop's Staff released "Becoming Beloved Community Where You Are," a practical resource for individuals, congregations and communities to apply the original Church-wide vision to their contexts. Dioceses and congregations across the Church reported the resource was especially useful for bridging the gap between Church-wide initiatives and ministry on the ground. Many dioceses, including Arkansas, El Camino Real, Iowa, Indiana/Northern Indiana, Southwestern Virginia and even more individual congregations and ministries organized their own Becoming Beloved Community sessions and shared wisdom with the wider Church.

Reconciliation and Communications staff partnered yet again in November 2017 to offer "Preparing to Become the Beloved Community," an Advent formation curriculum with materials suited for usage any time of year. The team also launched a corresponding social media campaign with daily reflections, blog posts and/or exercises to foster racial healing, reconciliation and conversation.

The Becoming Beloved Community vision also caught the imagination of ecumenical and secular organizations. By Winter 2018, we were in partnership talks with our full communion partners the Evangelical Lutheran Church in America, which shares the Episcopal Church's struggle to embrace and honor different cultures and races. The W. K. Kellogg Foundation also expressed strong interest in Becoming Beloved Community as a primary framework for engaging faith groups in the foundation's $200 million effort to end racism in America. The team also made promising presentations with the J.C. Flowers Foundation, with a pending ask for $1 million to support an ongoing Racial Reconciliation Fund.

These overarching efforts ran alongside specific initiatives in the four (4) quadrants of the labyrinth: TELLING the Truth about Our Churches and Race, PROCLAIMING the dream of Beloved Community, PRACTICING the way of love in the pattern of Jesus; and REPAIRING the breach in society and institutions. For the most up-to-date stories and resources for work in this area, please go to The Episcopal Church's website and click follow links for Racial Reconciliation: www.episcopalchurch.org/reconciliation:

TELLING THE TRUTH ABOUT OUR CHURCHES AND RACE

Core Questions: Who is included and excluded? What things have we done and left undone regarding racial justice and healing in the church?

a. *Census of The Episcopal Church (related to Resolution 2015-A182)*
   If we seek reconciliation, healing and new life, it begins with telling the truth about The Episcopal Church's racial composition, especially given the Church's relationship to the complex history of race in the seventeen (17) nations we call home.

   The Domestic and Foreign Missionary Society [DFMS] is contracting with Delaware-based North Star Strategies to assist in conducting a more comprehensive, multi-nation, Church-wide census and thus to gain a clearer understanding of the demographics of the Church. They are expected to begin in early 2018 with the Dioceses of Connecticut, Washington, Atlanta, Georgia, Minnesota, San Joaquin and El Camino Real (pending as of Blue Book Report deadline). Once the models and methods have been tested and improved, the process will spread to more dioceses over a three (3) year period.

b. *Audit Church's Participation in Racial Injustice and in Reconciliation (related to Resolutions 2015-A182 and A2015-024)*

The audit process will gather information about our historic and current participation in systems of racial injustice, as well as how Episcopal groups participate in racial reconciliation and justice. The Officers Group has charged staff to engage provincial leadership, the Executive Council Committee on Anti-Racism and legal experts to design a process that accounts for 1) the make-up of major Episcopal bodies and 2) processes of recruiting, selecting, hiring and training that reinforce or transform Church committees, staff and leadership. Initial results are expected by the 79ᵗʰ General Convention.

PROCLAIMING THE DREAM OF BELOVED COMMUNITY

Core Questions: What is the story of race and the vision of Beloved Community in the wider communities we inhabit? What collective commitments and behaviors will foster healing, reconciliation and justice?

a. *Regional Public Sacred Listening and Learning Engagements around Race (related to Resolution 2015-A182 and Resolution 2015-A024)*
As we speak the truth about the history and reality of race in a particular place, we can then take steps to re-imagine the dream of God in those contexts. The Church is especially well positioned to convene diverse, multi-sector circles where partners can name what Beloved Community would look like and what they will do to foster it.

The "Becoming Beloved Community Where You Are" resource offered specific steps for congregations and dioceses seeking to host regional public sacred listening and learning sessions. The team also worked closely with a few locations to create sessions, with the hope that the whole Church could join in watching and learning from one community's reflection:

- *Washington National Cathedral*: Co-sponsored and organized series of events in 2017 and 2018 designed to engage congregation, city and wider community. Each livestreamed to a broad, extended audience.
- *Province IX*: Organized an August 2017 gathering of women leaders in the Latin American dioceses (Province IX) in Panama, led by Catherine Meeks, Ema Rosero-Nordalm and Heidi Kim
- *Diocese of Southwestern Virginia*: Supported and amplified Fall 2017 diocesan campaign featuring three (3) sessions across the diocese
- *In progress for 2018:* Episcopal Health Foundation/Diocese of Texas; Brotherhood of St. Andrew/Diocese of Atlanta; Diocese of Southern Ohio

PRACTICING THE WAY OF LOVE IN THE PATTERN OF JESUS

Core Questions: How will we grow as reconcilers, healers, and justice-bearers? How will we actively grow relationships across dividing walls and seek Christ in the other?

a. *Beloved Community Story-Sharing Campaign (related to Resolution 2015-A182)*
Funded chiefly by a Constable Grant, the Campaign calls Episcopalians to tell and receive stories of faith, race and difference within our Churches, between diverse Churches, and

beyond the Church in community sessions and individual meetings. Led by Project Coordinator Hershey Mallette Stephens, Curriculum Consultant Day Smith Pritchartt and an Advisory Group, the Campaign will release a Story-Sharing Guidebook in March 2018. Six (6) young adult interns across the Church will collect stories and train groups in story-sharing. Churches can then use the Episcopal Asset Map and other resources to link virtually and share stories across cultural/regional divides, culminating in a story-sharing event at General Convention.

b. *Multilingual, Multigenerational Formation for Dismantling Racism (related to Resolution 2015-D040)*:

- Overall, Church leaders turned from one-size-fits-all approaches to training and celebrated the breadth of trainings and programs such as Seeing the Face of God in Each Other, VISIONS Inc., Crossroads, Kaleidoscope, The People's Institute and more.

- In May 2017, DFMS entered into formal partnership with the new Absalom Jones Center for Racial Healing in the Diocese of Atlanta. The Center will be a hub for developing and sharing a new generation of resources for racial justice and reconciliation. Materials in Spanish and for youth groups are already in development or in trials.

- In November 2017, the Executive Council Committee on Anti-Racism released a white paper and new set of training guidelines for effective training to dismantle racism, with support from the Presiding Bishop's staff.

c. *Liturgical Formation (related to Resolution 2015-A182)*: The Standing Commission on Liturgy and Music identified and developed a rich collection of worship resources for racial reconciliation. Upon approval they will be featured on the Episcopal Church's racial reconciliation site at www.episcopalchurch.org/reconciliation.

d. *Book Studies (related to Resolution 2015- A183):* The "Becoming Beloved Community Where You Are" resource recommended that Episcopalians organize book study groups to read a carefully curated set of books, including Michelle Alexander's *The New Jim Crow*.

e. *Reconciliation and Justice Pilgrimages*:

- Episcopalians put feet on our faith with journeys like the Young Adult Pilgrimage to Ferguson (Fall 2015), a planned Young Adult Pilgrimage to either Navajoland or Standing Rock, and various diocesan pilgrimages.

- The House of Bishops' Fall 2017 gathering in Alaska turned bishops into pilgrims who prayed, witnessed and walked closely with indigenous brothers and sisters.

- Members of the Presiding Bishops' team also joined two (2) Episcopal Relief & Development reconciliation pilgrimages to slavery-related sites in Ghana in 2017. A film and teaching tool on the pilgrimages will be available prior to General Convention.

REPAIRING THE BREACH IN SOCIETY AND INSTITUTIONS

Core Questions: What social institutions and systems are broken? How will we participate in the repair, restoration, and healing of institutions and systems?

a. *Partnership with Episcopal Historically Black Colleges and Universities (HBCUs)*

- The C019 Officers Group is passionate about repairing the Church's relationship to St. Augustine's and Voorhees, the two (2) historically Black schools founded by the Episcopal Church. In addition to ongoing block grants to both schools, the C019 Officers Group dedicated funding and staff time to improve essential administrative function, fundraising efforts and academic/community programming.

b. *Criminal Justice Ministries (related to Resolutions 2015- A183, 2015- D068, and 2015-A011)*

- The Office of Government Relations [OGR] led advocacy efforts to change federal sentencing policies that fuel mass incarceration. Many dioceses, congregations, and groups worked to block the school-to-prison pipeline (of special note is All Our Children, which hosted its first national gathering in January 2018) and to accompany people exiting prison and struggling to reenter community (note partnerships between New York City Episcopal parishes and the J. C. Flowers Foundation).

- At the Church-wide level, the Presiding Bishop's team co-sponsored two (2) convenings of prison re-entry ministries (Louisiana, March 2017; Nevada, November 2017).

- The team also assembled an Advisory Group led by formerly incarcerated people, the first step in a project to develop re-entry programs that address the spiritual, physical, economic and emotional needs of formerly incarcerated people and their families.

c. *Immigration and Refugee Reform*:

- In Summer 2017, the C019 Officers Group took special note of the link between racism and immigration/refugee policies emerging in the United States. They welcomed Racial Reconciliation and Justice staff to join colleagues in OGR, Episcopal Migration Ministries [EMM], Ethnic Ministries and regional and local networks.

- Episcopal groups dedicated to immigration reform partnered more fully in 2017. Staff from OGR, Racial Reconciliation, EMM, Ethnic Ministries worked to support Deferred Action for Childhood Arrivals (the "Dream Act") and other programs to protect and welcome immigrant neighbors.

- The November 2017 Episcopal Revival in the Diocese of San Joaquin – titled "Called to Be a Safe Place for All God's People" – highlighted the powerful synergy between evangelism, racial justice and immigration reform.

- In January 2018, leaders from EMM, OGR and Racial Reconciliation proposed a process for sponsoring joint efforts like EMM's Love God, Love Neighbor Training and Partners in Welcome project.

2019-2021 TRIENNIUM

The C019 Officers Group understands that Becoming Beloved Community is a long-term commitment, and they urge the General Convention to dedicate significant funding for the effort well into the next decade. 2016-2018 budget expenditures for this ministry will amount to less than $1 million, which means more than $1 million will be available to continue the work in the 2019-2021 triennium. Those funds will be essential for pursuing efforts in all four (4) parts of the labyrinth, including the following:

- Further Census and Audit data gathering and analysis in dioceses, provinces, seminaries, House of Bishops, House of Deputies and other Episcopal institutions.

- More Sacred Listening and Learning Engagements will be held across the Church, many of them locally sponsored with consultation from the Church wide team.

- Beloved Community Story-Sharing Campaign will spread to even more of our neighbors and ecumenical/interfaith partners, and include more podcast and/or video components, all of which will be featured via social media and smoothly transferred to Archives.

- Dismantling Racism/Anti-Racism formation will emphasize state-of-the-art training of trainers, and the development of even more resources for understanding and dismantling racism in diverse cultural contexts.

- The Church will learn from and call upon the National Association of Episcopal Schools, an ally committed to preparing young people to forge Beloved Community.

- We will devote more resources and energy to partnerships with ecumenical and secular organizations that address the growing threat to people of color in the U.S. and around the world, especially focusing on criminal justice reform, poverty and immigration/refugee policy.

ADDITIONAL REPORTS

Report of the Staff of the Presiding Bishop

REPORT OF THE STAFF OF THE PRESIDING BISHOP

Introduction

The staff of the Presiding Bishop encourages the Episcopal Branch of The Jesus Movement, supporting Dioceses and Congregations in their ministry and enhancing their ministry by doing that work which Dioceses and Congregations need but cannot do themselves such as networking Episcopalians with each other, organizing church-wide events, connecting Episcopalians with Anglican Communion, ecumenical and interfaith partners and working with and alongside the U.S. Government to accomplish the ministry of our Church. Broadly speaking the work of the Presiding Bishop's Staff is organized in three (3) areas: work within the Episcopal Church, Ministry Beyond the Episcopal Church and Ministry in three (3) Mission Priority areas: Evangelism, Racial Reconciliation and Care of God's Creation. This report is a brief suggestion of the faithful work of the dedicated professionals who serve our Church, working on behalf of every Episcopalian to the glory of God.

The Episcopal Branch of the Jesus Movement

Throughout this triennium, Episcopalians have begun to embrace our identity as a branch of The Jesus Movement: the ongoing community of people following Jesus into *loving*, *liberating* and *life-giving relationship* with God, each other and creation. Together, we're seeking to love God with our whole heart, soul and mind *and* to love our neighbors as ourselves (Matt 22:36-40), and to restore each other and all of creation to unity with God in Christ (BCP, p. 855).
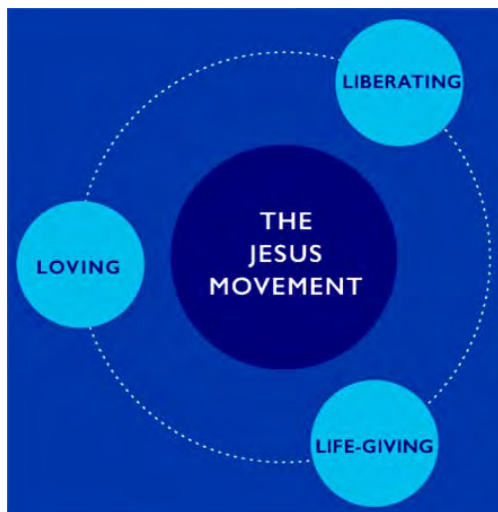
Jesus launched this movement when he welcomed the first disciples to follow his loving, liberating, life-giving Way. Today, we participate in his movement with our whole lives: our prayer, worship, teaching, preaching, gathering, healing, action, family, work, play and rest.

In all things, we seek to be loving, liberating and life-giving—just like the God who formed all things in love; liberates us all from prisons of mind, body and spirit; and gives life so we can participate in the resurrection and healing of God's world.

God is love, and God's very being is a trinity of loving relationship: Father, Son and Holy Spirit. In Christ, God invites us to share that love. Wherever there is pain or alienation, God longs to knit all people and creation back into wholeness and relationship.

As the Episcopal branch of The Jesus Movement, and followers of Jesus' Way, we seek to live like him. We're serious about moving out to grow loving, liberating, life-giving relationships with God; to grow those relationships with each other; and to grow those relationships with all of creation.
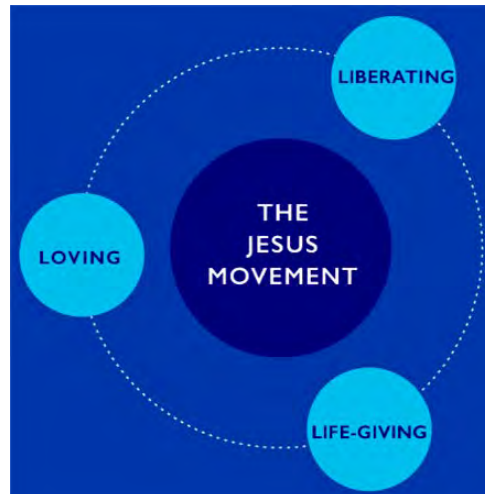
Ministry Within the Episcopal Church

OFFICE OF THE PRESIDING BISHOP

Organizing Staff for a New Presiding Bishop

A challenge which faces each Presiding Bishop is how to manage a staff of one hundred and sixty (160) plus people while traveling throughout the world on church business. The Office of the Presiding Bishop is organized to address this challenge by creating a Chiefs and Canons Round Table which supports the work of the Office of the Presiding Bishop. In addition, the Bishop in Charge of the Convocation of Episcopal Churches in Europe, the Bishop for the Armed Forces and Federal Ministries and the Bishop for Pastoral Development work directly with the Presiding Bishop.

The Ministry of the Presiding Bishop's Staff is guided by nine (9) people who report directly to him and all other members of his staff report to him through one (1) of those nine (9). There are three (3) Chief Officers, three (3) Canons to the Presiding Bishop and three (3) bishops who report to the Presiding Bishop.

Bishop Pierre Whalon is Bishop in Charge of the Convocation in Europe, Bishop Carl Wright is Bishop Suffragan for the Armed Forces and Federal Ministries, and Bishop Todd Ousley is Bishop Suffragan for Pastoral Development. Chief Operating Officer Geof Smith handles the building at 815 Second Avenue and the administrative staff including Information Technology and Human Resources. Chief Legal Officer Doug Anning handles legal matters. Chief Financial Officer Kurt Barnes handles the finances. Canon to the Presiding Bishop for Mission Priorities Stephanie Spellers supervises Evangelism and Church Planting and Racial Reconciliation including the Ethnic Missioners and Care of Creation. She is the Presiding Bishop's liaison to all efforts in these areas. Canon for Ministry Beyond

the Episcopal Church Chuck Robertson supervises the Office of Government Relations, Episcopal Migration Ministries and Global Partnerships and as the Presiding Bishop's ambassador to the Anglican Communion, ecumenical, and interfaith partners. Canon to the Presiding Bishop for Ministry within the Episcopal Church Michael Buerkel Hunn functions in a quasi-chief of staff role, is Director of the Office of Communication and supervises the Departments of Transition Ministry and Formation and is the Presiding Bishop's liaison to various groups within the church.

This management configuration is an intentional effort to flatten the hierarchy and foster collaboration among senior staff who are part of the Presiding Bishop's "Chiefs and Canons Round Table." It also allows the Presiding Bishop to manage his staff personally rather than delegating day to day management to a single person - and to do it from wherever in the world he happens to be at a given moment.

The Presiding Bishop's travel schedule means that his office needs to travel with him. As a matter of routine, Executive Coordinator Sharon Jones and one of the Canons to the Presiding Bishop travel with him. This keeps the day to day operations of his staff running smoothly wherever he happens to be at any given time. We have intentionally adopted management methods which are not location specific allowing the Presiding Bishop and members of his staff to maintain close collaboration and strategic alignment even as they travel the Church.

Nearly half of his staff are dispersed through the Church. The Finance Office, Operations, Development Office, Human Resources and the management of the 815 Second Avenue property itself are based in New York, while those supporting the mission and ministry of the Church are located elsewhere.

Culture Change

Over the past two (2) years we have been intentionally working to become a loving, liberating and life giving workplace in which all employees are focused on Engaging their work with Esteem in their hearts, always moving in the direction of Excellence. The three "E's": Engage, Esteem, Excel characterize our hoped for culture. We engaged Human Synergistics to guide our culture change work and Michael Hunn is the staff person leading that effort. In the past two (2) years every DFMS Officer, Chief, and Canon have done 360 leadership reviews and followed up with executive coaching. Every director and manager has done a 360 management review with management training and coaching by The Brighton Group. We have changed internal communication patterns and clarified job descriptions, and organizational structure and audited every salary to ensure fairness and appropriateness. We can report substantial progress in the right direction with work still to be done.

Goals

We have been focused on The Jesus Movement - encouraging loving, liberating, and life giving relationships with God, each other and all of creation. This is not a program, but an emphasis on the

lively and organic "movement" which characterized the Church in the Book of Acts and is appropriate in our time and context.

So the Presiding Bishop is partnering with local bishops to hold revivals throughout the Church. Each revival is designed to awaken and inspire local Episcopalians to spread the good news of Jesus Christ and deepen their own relationships with God. The revivals, like many of the events featuring Bishop Curry are live-streamed to an eager and growing internet audience.

Relations between The Episcopal Church and the Anglican Communion are in a time of healing and rebuilding as the Presiding Bishop works with the Archbishop of Canterbury and the Primates of the Anglican Communion to collaborate on Evangelism and partner in ministry even as disagreements about human sexuality persist.

Two thirds of the way through Presiding Bishop Curry's first triennium, the spirit of The Episcopal Church is hopeful and enthusiastic even as we know change is on the horizon as the Church continues to face financial, vocational and demographic challenges in the 21st century.

-The Rev. Canon Michael Buerkel Hunn
Canon to the Presiding Bishop for Ministry within the Episcopal Church

OFFICE OF THE CHIEF OPERATING OFFICER

The scope of duties and role of the Chief Operating Officer (COO) have been revised to bring focus on the efficient functioning of the Domestic and Foreign Missionary Society [DFMS] from an operational perspective. The COO oversees the day-to-day operation and management of Human Resources, Information Technology, Buildings and Facilities, and real estate acquisitions and construction projects. In addition, the COO is actively engaged in the work begun with Human Synergistics to build a more collaborative and engaging culture among those working for the DFMS.

Some of the accomplishments of the 2015-2018 triennium, and work currently underway include:

Human Resources
- During the 2015-2018 triennium, HR executed the hiring processes for seventy (74) new hires to the DFMS, and seventy-six (76) terminations and retirements.

- In April, 2016, after months of preparation, HR and Payroll went live with a conversion from Ultipro to ADP. ADP now houses both payroll/payroll processing and HR data.

- After a twenty-eight (28) year career with the Episcopal Church, John Colón retired as Director of Human Resources on February 28, 2017. On May 1, 2017 he was succeeded by Raphaelle Sondak. Sondak who has extensive experience in human resources, and previously was the human resource director at Catholic Guardian Services, a social services agency in the New York region.

In addition, she has been an adjunct professor teaching human resources management at Mercy College and has also served on the Board of Directors at Hudson Valley Hospital Center.

- HR has completed a review of all job descriptions within the DFMS. This work provides a basis for creating a performance assessment process based upon goal and objective achievement. The work will also be foundational to a review and organization of compensation grade levels, assuring consistency and fairness in the compensation management process. Longer term, we will provide staff training and development opportunities that support career development.

- In addition to the updated position descriptions and performance management tools being rolled out in early 2018, HR will be reviewing and updating our recruitment strategy.

- HR has provided mandatory training to all DFMS employees on harassment prevention and diversity.

Information Technology

- Through 2017, IT completed the virtualization of most servers, with a corresponding major reduction in the amount of server hardware deployed; the addition of webinar capabilities to video conferencing, and technical support for major DFMS webinars; and an expansion in support of wireless devices (phones, tablets, hotspots) for DFMS staff.

- IT completed the transition from the Office 2003 suite to Office 365, a cloud-based set of tools and technology that will further enable collaborative and more efficient project management among DFMS employees in New York City and their colleagues around the globe.

- In June, 2017, consulting firm BDO conducted a thorough risk and operational assessment of the IT Department, resulting in the development of a roadmap prioritizing projects and process improvements that will be implemented in the 2018-2021 triennium. Following this review, Richard Serota announced his retirement as Director of IT, after a twenty-seven (27) year career with the DFMS.

- On September 19, 2018, Darvin Darling joined the DFMS as Director, Information Technology. Darvin previously held the role of Director of Information Technology and Technical Services at The Riverside Church, where he was charged with providing the design, implementation, rollout, training and support of all technology systems and technical teams as well as upgrade all of Riverside's infrastructure and security systems. He also built up the services department teams to provide services, support and ongoing training to Riverside's staff, tenants and short term rental clients.

- Since September, the IT Department has steadily improved the infrastructure at 815 Second Avenue, the Office of Government Relations and the Office of Federal Ministries; while working to reduce IT costs to the DFMS.

Real Estate and Facilities Management

- The central location and proximity to the United Nations of 815 Second Avenue has led to the building being an ideal site for meetings of the United Nations Commission on the Status of

Women every year, as well as five (5) other UN conferences and meetings; plus eighteen (18) other group meetings and conferences by Episcopal and other faith-based groups.

- We maintain good landlord/tenant relationships with our principal lessees of space at 815 Second Avenue: The Children's Defense Fund, The AdCouncil, the Permanent Mission to the United Nations of the Republic of Haiti, the Lyceum Kennedy International School; as well as affiliated partners: the Society for the Increase of the Ministry, Episcopal Relief and Development, Colleges and Universities of the Anglican Communion, and the National Association of Episcopal Schools. In August, 2017, the Permanent Mission to the United Nations of the Kingdom of Lesotho moved from the building.

- After an independent assessment of market options, the DFMS will remain at 815 Second Avenue for at least the foreseeable future. We have retained Avison Young to aggressively seek quality tenants ready to commit to leasing the unoccupied space within the building to further defray operating costs and are initiating a request for proposals from several leading commercial real estate brokers for executing this process.

OFFICE OF COMMUNICATIONS

The General Convention of 2015 tasked The Episcopal Church's Department of Communications with supporting Digital Evangelism during this triennium by asking the department to devote $750,000 of its existing budget to Digital Evangelism.

The approved 2013-2015 budget is here.

https://www.episcopalchurch.org/files/documents/2013-2015_five_marks_of_mission_budget_adopted_july_11_2012.pdf

The enabling Resolution 2015-B009 Develop a Digital Evangelism Initiative, is here:

https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2015-B009   Resolution 2015-B009 calls for *"the Domestic and Foreign Missionary Society to develop and conduct a digital evangelism initiative consisting of several campaigns, with equitable representation among the domestic provinces…"*

As a result, over the past two (2) years, the Department of Communications has been transformed, with digital evangelism in the spirit of The Jesus Movement one of the top priorities. While this report cannot describe every effort, it will detail the strategy that has been engaged by the gifted team of communication professionals led by Director of Communications, The Rev. Canon Michael Buerkel Hunn, and provide examples.

In today's communication environment, people learn about The Episcopal Church online well before they darken the door of one of our churches, and in fact their relationship with The Episcopal Church and their impressions of our Church are formed online before they consider attending one of our faith communities. Digital Evangelism puts emphasis on building relationships with the people engaged online - learning about their questions and yearnings so we can provide content to make their needs and deepening our relationships with our online community members by deepening their relationships with The Episcopal Church through active online interaction with people.

Communications continues and grows on the foundation of current offerings, including Episcopal News Service, websites, newsletters, blogs and video content, Public Affairs, etc. Digital Evangelism has been effectively and seamlessly folded into the mix of communications tools.

Our Digital Evangelism efforts are already yielding results:

TEC Facebook Page
Total Likes on Jan. 1, 2017: 158,783
Total Likes on Dec. 15, 2017: 169,182 (+10,399)

Total Unique Video Views (YTD): 1,583,927

Average Daily Engaged Users (YTD): 6757
YTD Total Reach: 36,744,341

 PB Curry Facebook Page
Total Likes on Jan. 1, 2017: 6,847
Total Likes on Dec. 15, 2017: 16,302 (+9,455)

Total Unique Video Views (YTD): 659,007

Average Daily Engaged Users (YTD): 718
YTD Total Reach: 3,225,749

Other key steps taken in the Office of Communications include:
- Stronger use of digital marketing tools to understand, build, and nurture relationships with our audiences.

- Jeremy Tackett was hired as the first Digital Evangelist in the church. Staff member Chris Sikkema was reassigned to assist Jeremy.

- We are exploring ways to connect Digital Evangelism with face-to-face Evangelism. A powerful example of this was The Jesus Movement Revival in Kansas City. The Digital Evangelism team arrived in Kansas City three (3) days before the event and partnered with local diocesan staff to design a digital evangelism strategy to support the revival. Country music mega-superstar Garth Brooks was scheduled to play the night of the revival in the same venue. This drew concert-goers to the parking lot for tailgating prior to the show. Immediately, the Digital Evangelist team developed hash tags and got into online conversations on the Garth Brooks fan twitter feeds to let people know about the revival. A good number of Garth Brooks fans heard Presiding Bishop Curry's sermon at the revival and were introduced to the Episcopal Church that day because of our efforts in digital evangelism.

- The learnings gathered from the Kansas City experience have not only informed our subsequent efforts, but we are also sharing those learnings with communicators church-wide through a digital evangelism blog on Episcopalchurch.org.

- Digital Evangelism also means expanding the reach of an event or program or ministry by magnifying the digital audience. Facebook Live was utilized to stream the revival in Kansas City. One thousand two hundred (1200) people attended the two (2) events in person, but over sixty thousand (60,000) people saw it online. Facebook Live is now employed for many events.

- Episcopalchurch.org was redesigned with a cleaner look and an easier to use format. Barry Merer has led the way of redesigning and rebuilding the entire site to meet the needs of The Jesus Movement as well as mobile-optimized so the content, look and feel of Episcopalchurch.org not only looks good on a cellphone or tablet but functions differently to make it user friendly on each device. Since sixty (60) percent of people now engage with Episcopalchurch.org from a mobile device, it is critical that all our Digital Evangelism content is available on the phones in people's pockets.

- The shift is underway from being a church which speaks English and occasionally translates items into Spanish or Creole to being a truly multilingual multicultural church. Releasing important information simultaneously in multiple languages is now the norm and the Communications Department is working hand-in-hand with LatinosEpiscopales to integrate digital environments and contents. Maria Pacheco was hired as the Manager of Language Services to facilitate this work and also to provide in house translation expertise.

- A visual identity consistent with The Jesus Movement was developed by graphic designer Melissa Walker who was hired with funds previously used for freelance consultant designers. Her gifts have been a great asset to our team.

- Video content is led by Mike Collins. He, Editor Olivia Greene and their video production team have provided videos of the highest quality for years. The videos tell the story of the mission and ministry of The Episcopal Church and also focus on teaching The Episcopal Church how to create video content.

- Short videos on social media have been created and edited on cellphones and are now giving the whole church behind the scenes access to the Presiding Bishop as he travels the world in the name of Jesus Christ. Snippets of his sermons and lectures, video essays about the Episcopal Youth Event, interviews with people doing ministry in local churches and "in the procession" views of Episcopal Ordinations are knitting our Church together.

- The Public Affairs work of the Department plays a critical role in spreading the good news of The Jesus Movement. Neve Rae Fox is tireless in helping connect Bishop Curry with opportunities to spread the message of The Jesus Movement beyond the Church. In addition, to the ongoing release of information and news of the Church, she also coaches bishops and candidates for bishop in effective ways to craft messages and work with the press. She has put together workshops across the Church about effective communication - taking with her other members of the department. She supports diocesan leaders in times of crisis and is now leading an effort to improve internal communication within the staff of the Presiding Bishop.

- The Episcopal News Service [ENS] examined its structure and mission under the direction of Lynette Wilson. It has rebuilt its website and has reinvigorated its reporting under the clear mandate to be the news vehicle of The Episcopal Church. ENS covers the church even through matters of church discipline or controversy. ENS reports the facts accurately when many outside media organizations misunderstand or misreport. ENS is working to learn more about its audience in order continue to grow and adapt, providing more of the kind of coverage its audience needs.

- Daily social media prayers are presented by Mary Brennan, who also designs and coordinates booths for General Convention booth and CEEP, along with giveaways like The Jesus Movement bookmarks and water bottles.

What's Next for the Office of Communication?

In the next triennium, the Asset Map will replace our ChurchFinder on Episcopalchurch.org. The Asset Map has grown and now contains much more qualitative data than the ChurchFinder. Adding geolocation will connect the digital world to the physical world to find an Episcopal Church, soup kitchen, youth group or bible study.

Related documents:
https://www.episcopalchurch.org/page/general-convention-budget-and-diocesan-commitments?tid=2626&tid_2=All

Digital evangelism resolution
https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2015-B009

Digital evangelism general Archives search
https://www.episcopalarchives.org/cgi-bin/digital_archives/DAsearch.pl?user_query=digital%20evangelism

OFFICE OF DEVELOPMENT

The Office of Development of the Episcopal Church identifies, cultivates and solicits prospective donors to support the ministry of The Episcopal Church. The vision of the Office of Development is a Church whose ministries and programs are fully funded and growing.

How does the Office of Development work toward this vision?

The Office of Development team is staffed by fundraising professionals who employ best practices to achieve the Church's fundraising goals. Among the services the Office provides to Episcopal Church programs and initiatives are:

- Developing strategic fundraising plans.
- Identifying donors and prospects at every level of giving and providing prospect research.
- Soliciting major gifts from donors in face-to-face meetings.
- Creating and managing direct mail appeals.
- Identifying foundation grant opportunities and providing grant writing assistance.
- Securing corporate donations and partnerships.
- Launching on-line fundraising campaigns, such as Crowdsourcing.
- Maintaining donor records and stewarding gifts through database management.
- Advising donors on planned giving vehicles and opportunities.
- Offering training in fundraising techniques to dioceses, parishes, churches and programs through on-site visits, workshops, and conferences.
- Thoughtful stewardship and cultivation of donors and their gifts.

What are the Office of Development's current priorities?

Fundraising goals of the Office of Development may change based on institutional priorities and shifts in the political and economic climate, but the commitment to growing and stewarding a core group of supporters remains constant. As directed by General Convention, through the Executive Council and the Presiding Bishop of the Episcopal Church, the 2016-2018 fundraising priorities of the Office of Development are:

- The Campaign for the Archives and Mission Research Center of The Episcopal Church
- The Diocese of Haiti, including St. Barnabas Agriculture College (CASB) and planning for the Holy Trinity Cathedral (Complex)
- The Episcopal Church in Navajoland
- The Campaign for the Episcopal Archives and Mission Research Center

- Becoming Beloved Community, including initiatives for racial reconciliation and justice, support for Historically Black Colleges and Universities (HBCUs) and a partnership with the Washington National Cathedral.

- In 2017 The Office of Development was asked to seek funding for Episcopal Migration Ministries in response to the elimination of federal funding.

- The Office of Development also provides support and technical assistance annually through Project Resource, a three (3) year old program that provides intensive fundraising training to dioceses and parishes.

- Conducting an Annual Presiding Bishop's Appeal is an on-going project in the planning stage.

The Office of Development is positioned between church leaders and those church programs that require funding, ready to provide the compelling stories, succinct data and opportunities that invite generous giving and participation from many funding sources and individual supporters.

OFFICE FOR TRANSITION MINISTRY

The Office for Transition Ministry [OTM] supports Episcopal Church search and call processes for clergy, lay leaders and worshiping communities. The two (2) members of the Office for Transition Ministry staff offer individualized assistance to all OTM Portfolio database users Church wide through telephone, video, and e-mail support. Staff also participate in and support the work of Ethnic Ministries (Nuevo Amanecer, Black Clergy Conference) Research, Communications, Episcopal News Service, New Church Starts, and other initiatives. The Office works in collaboration with the Board for Transition Ministry, and closely with Diocesan Transition Ministers in each diocese. Important Church wide conversations around call trends, diversity, bias, ordination formation options, congregational development, ecumenical cooperation, leadership and additional matters continue to develop.

As technology has changed rapidly in recent years, the database is in the process of updating and improving. The Board for Transition Ministry, Diocesan Transition Ministers, bishops, and other Portfolio users highlighted areas for improvement. Updates being currently undertaken include the areas of:

- User experience improvement including ease of use

- Stability and full functionality on mobile, tablet, laptop, and desktop platforms

- Cross platform reliability (use on PC, Mac, Linux, all website browsers)

- Search functions

- Strengthening information security

In the next triennium, with input from users, improvements can be expected in the areas of:

- Simplifying compensation information pages

- Mapping available positions

- Specialized search and output options

- Any needed data security enhancements

- Changes identified by primary users and others, with guidance from the Board

The Board is planning a church wide gathering for Diocesan Transition Ministers for March 2019.

FORMATION DEPARTMENT

Major Projects: Formation Department 2016-2018

The Formation Department serves to nurture and resource networks for youth, young adult, and campus ministry by creating and curating leadership development resources, hosting online and in-person conferences and gatherings, as well as offering professional support at the local, diocesan, and provincial level. The Formation Department assists other departments of The Episcopal Church by undertaking projects that have a component of outreach with youth and young adults. Examples include the Ferguson Pilgrimage, General Convention Official Youth Presence (GCOYP), Young Adult Service Corps (YASC) and UNCSW. The Formation Department has several regular wider church events, including the triennial Episcopal Youth Event, GCOYP, the Young Adult and Campus Ministry Leadership Conference, and the Young Adult Festival at General Convention.

Young Adult and Campus Ministry Leadership Conferences

Titled "Nourish" in 2016 and "Cultivate" in 2017, the Office of Young Adult and Campus Ministries sponsored this gathering of approximately one hundred and twenty (120) leaders from across the church for three (3) days of worship, networking, learning, and inspiration. In 2016, the event was held in at the Maritime Center in Baltimore. In 2017, it was held in St. David's church in downtown Austin. In 2018, these leadership events will be held regionally. For more information please see url: https://www.episcopalchurch.org/youngadult.

Young Adult Festival

The Young Adult Festival is held in conjunction with each General Convention. In 2015, the Festival was held June 24-29, welcoming more than eighty (80). For more information please see url: https://www.episcopalchurch.org/youngadult.

Episcopal Youth Event 2017 [EYE17]

EYE17 welcomed more than nine hundred (900) youth and five hundred (500) adult mentors, workshop leaders, speakers, volunteers, and exhibitors to the campus of the University of Central Oklahoma from July 9-13, 2017. EYE17 was organized in partnership with the Episcopal Diocese of

Oklahoma. Presiding Bishop Michael Curry preached at the Opening Eucharist with The Very Rev. Miguelina Howell celebrating and The Rev. Winnie Varghese preached at the closing Eucharist with The Rev. Gay Clark Jennings, President of the House of Deputies, celebrating. Keynote speakers included Oklahoma City Bombing survivors and representatives from Kids 4 Peace. For more information please see url: https://www.episcopalchurch.org/eye.

General Convention Official Youth Presence [GCOYP]

General Convention resolutions dating back to 1982 provide for an Official Youth Presence. GCOYP is comprised of two (2) youth from each province of the Episcopal Church as well as a number of adults to act as chaperones and advisors. In 2016, the Formation Department coordinated and assisted the General Convention Office with all aspects of the planning and implementation of GCOYP.

Children's Program at General Convention

In 2015, the Formation Department coordinated the GC Children's Program, including all programming, volunteer recruitment, training, and staffing. Over nine (9) days of General Convention, the Children's Program welcomed twenty-five (25) children. The Department is collaborating with the General Convention Office and their consultants for the 2018 Convention.

Young Adult and Campus Ministry Grants

During the triennium, $400,000 was distributed to across three (3) grant categories:

- *Leadership Grants* to establish a new, restore a dormant, or reenergize a current campus ministry.
- *Campus Ministry Grants*, which provide seed money to assist in the start-up of new, innovative campus ministries or to enhance a current ministry.
- *Young Adult Ministry Grants*, which provide seed money to assist in the start-up of new, innovative young adult ministries or to enhance a current ministry.

For more information please see url: https://www.episcopalchurch.org/young-adult-and-campus-ministries

Asset-Based Community Development Curriculum and Trainings

The Formation Department worked with the Domestic Poverty Office and Episcopal Relief & Development to create the curriculum and launch trainings for the "Called to Transformation" ABCD project. For more information please see url: http://calledtotransformation.org/.

Update Model Policies for Preventing Sexual Misconduct

In response to Resolution 2015-A073, passed by the 2015 General Convention, the Formation Department participated in the Task Force to Update the Model Policies for Preventing Sexual Misconduct "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." Please see the Task Force's report for more information.

Support Network Development for Christian Formation Leadership

The Formation Department regularly participates in boards, meetings, workshops, and conferences designed to further create a network for Christian formation leaders to rely on for resources, inspiration, and support. These include:

- FORMA, the member-based network for Christian Formation for The Episcopal Church, received dedicated funding for this triennium from the Formation Department budget so that they could increase capacity. The Formation Department continues to support and participate in FORMA's annual conference and sends a liaison to board meetings.

- Episcopal Camps and Conference Centers (ECCC) also works in partnership with the Formation Department. Staff attend their annual meeting providing workshops and training and also consult at various leadership meetings and centers throughout the year.

- Episcopal Service Corps (ESC) consults with the Formation Department regularly for support and strategic planning. Staff participate in their board meetings in an *ex- officio* liaison capacity. This organization received a major grant from the General Convention in the previous triennium.

- Older Adult Ministries is no longer funded as a General Convention Priority. However, Formation Department staff continue to leverage the dedicated Benignus Fund to convene leaders and resource this ministry in partnership with the Center for the Ministry of Teaching at Virginia Theological Seminary.

- Finally, staff attend and host meetings and collaborations throughout the triennium with our Ecumenical Partners.

Mission Priorities: Evangelism, Reconciliation and Creation Care

There is no ministry, function, or body in the Church that exists apart from The Jesus Movement. In particular, General Convention 2015 named three (3) areas for deeper engagement and investment:

- Evangelism … grow loving, liberating, life-giving relationships with God
- Reconciliation … grow loving, liberating, life-giving relationships with each other
- Creation Care … grow loving, liberating, life-giving relationships with creation

Nearly every department and ministry of The Episcopal Church bears the marks of these commitments. Several departments, interim bodies, volunteer groups and ad hoc circles maintain a particular focus on these areas and the intersections between them:

EVANGELISM

Once upon a time, the average Episcopal Church had no outreach committee or global missions. Now they do. What if evangelism followed a similar path? What if every diocese designated at least two (2) evangelists, and every congregation created an Evangelism Team? What if we followed Paul's advice in Ephesians 4, and gifted evangelists helped to equip all the saints for our shared baptismal ministry of proclaiming the good news in word and deed?

With Presiding Bishop Michael Curry as our Chief Evangelism Officer, the Episcopal Evangelism Team – comprised of the Canon for Evangelism, Reconciliation and Creation Care and a shared administrative associate; three (3) consulting evangelists who served five (5) to ten (10) hours a week; two (2) Digital Evangelism staff from the Communications Department; and several volunteers and interns; – has taken on this urgent mission.

Our work has been shaped by a practical definition of Episcopal Evangelism: "We listen for, name and celebrate Jesus' loving presence in everyone's stories – then invite people to MORE …" (detailed in a white paper on "The Practical Theology of Episcopal Evangelism," Episcopal Church Foundation's Vestry Papers, May 2017). Together, we have helped Episcopalians to claim evangelism as our common vocation, and then worked to equip, gather and send ordinary people to share the good news of Jesus' loving presence in daily life, especially online.

This triennium, we leveraged limited staffing and resources to establish the first church-wide Episcopal evangelism ministry since 2009, including:

- Resource center and story hub on the Episcopal Church website:
  www.episcopalchurch.org/evangelism

- Six (6) Episcopal Revivals (www.episcopalchurch.org/revivals) leading up to General Convention, with more slated through 2021; organized by hosting dioceses in partnership with the Presiding Bishop's staff

- Two (2) Evangelism Matters conferences and summits of evangelists – November 2016 and March 2018 – in partnership with Forward Movement; a result of General Convention 2015 Resolution 2015-A173

- Digital Evangelism strategies for Church wide and regional settings, led by the reconfigured Communications Department and the Task Force for Leveraging Social Media for Evangelism, which crafted practical and teaching resources, in response to Resolutions B009 and A172.

- Beloved Community Story-Sharing Guidebook and Campaign, to equip and organize Episcopalians to share stories of faith, race and difference with each other and with our neighbors; funded by a 2017 Constable Grant

- Multi-lingual, multi-cultural, regional trainings in evangelism for individuals, congregations and dioceses, including Episcopal Evangelism 101

- Episcopal Evangelism Grants Program to fund innovative evangelism in congregations, dioceses and regions; in collaboration with the Executive Council Standing Committee on Local Mission and Ministry

- Evangelism Charter for the Episcopal Church, drafted by the Executive Council Committee on Local Mission and Ministry in consultation with the Evangelism Team.

- Various evangelism initiatives launched via the departments of Ethnic Ministries, Youth and Young Adults and Global Mission

In particular, the Episcopal Revivals Campaign helped to light a fire for evangelism across the church. Thanks to funding allocated by Executive Council, the Presiding Bishop's Office and Episcopal Evangelism Team launched a series of Revivals across the church. More than a one-time worship festival, Episcopal Revivals are a collaborative effort between the Presiding Bishop's Office, a hosting diocese and many other partners. Each revival has aimed to stir deeper love for God and our neighbors through the following:

- advance evangelism, prayer and social media training for local leaders
- intentional development of new relationships with neighbors, especially people who have no church but wish to explore
- major gathering(s) featuring proclamation of the good news, prayer, music, commissioning, shared learning and other elements
- reconciliation and healing action to model wholeness and good news across cultural, socio-economic and racial barriers
- multiplying impact via digital evangelism that reaches tens of thousands of Episcopalians and a wider audience

In the absence of dedicated, full-time staff, the Evangelism Team has still organized revival follow-up mission and discipleship efforts, in concert with the wider circle of DFMS staff. Partners like RenewalWorks made available a spiritual vitality survey to measure spiritual growth in revival dioceses. Results were not in by the end of 2017, but will be available by the summer at the Episcopal Church revivals website: www.episcopalchurch.org/revivals.

Presiding Bishop Curry led or is scheduled to lead eight (8) revivals in 2017 and 2018 in the Dioceses of El Camino Real (pilot – January 2017 – approx. 1,000 participants), Pittsburgh (February 2017, approx.

600 participants), Western Missouri (May 2017, approx. 1,400 participants), San Joaquin (November 2017, approx. 700 participants), Georgia (January 2018), Honduras (April 2018), Austin (July 2018) and Western Massachusetts (October 2018). Planning is underway to host more Episcopal Revivals in 2019 and 2020 in locales like Michigan, Virginia, England, Washington, D.C., and Utah. Not every revival needs the Presiding Bishop's presence: the whole Diocese of Iowa and the Daughters of the King triennial in Austin – along with a host of churches and ministries spanning the globe – also trained, prayed and organized to join the revival movement.

EVANGELISM IN 2019-2021

The current triennium funded only half (1/2) of an Evangelism Staff Officer position. With at least one (1) full-time Staff Officer for Evangelism in the next triennium, the Evangelism Team could strengthen and deepen the church's still new evangelism ministry. We envision serving the church and helping to shift Episcopal culture around evangelism in these critical ways:

- Create and coach a network of diocesan evangelism catalysts (people with a unique call to promote and provoke evangelism at the local and regional level)

- Develop and/or coordinate the offering of more trainings to meet the Episcopal hunger for help practicing evangelism, including offerings in seminaries and formation programs, with an emphasis on 1) story sharing, 2) digital evangelism

- Continue organizing three (3) to four (4) Episcopal Revivals each year

- Host a third Evangelism Matters conference, including partners like the Episcopal Evangelism Society

- Robust, creative partnership with groups like Forward Movement and FORMA to link discipleship and formation with evangelism, understanding we cannot share Jesus' love with the world if his love is not at the center of our lives.

CHURCH PLANTING AND MISSION DEVELOPMENT

New and redeveloped ministries are uniquely well positioned to engage in evangelism (helping people to grow new relationships with God) and reconciliation (growing bonds across cultural/racial boundaries). With the leadership of staff as well as committed volunteers working on the Genesis Church Planting Advisory Group (formed as a result of General Convention 2015 Resolution 2015-D005), the Church has made extraordinary progress developing not just new ministries but a church planting movement.

RACIAL RECONCILIATION

As followers of Jesus we hope to embody his loving, liberating, life-giving way with each other, especially in the face of racial injustice. Via General Convention 2015 Resolution 2015-C019, the Church

asked its Presiding Officers to set out a vision for racial healing and reconciliation and committed $2 million to the effort. In May 2017, the Officers shared that vision, "Becoming Beloved Community," and since then several successful Church wide efforts have taken flight.

ETHNIC MINISTRIES

The Church's ministries with Asiamerican and Pacific Islanders, Black, Latino, and Native communities also represent a clear intersection of evangelism and racial reconciliation. We intentionally develop the church's witness with and by non-dominant cultural groups in order to grow loving, liberating, life-giving relationship with God and with each other.

DOMESTIC POVERTY AND UNITED THANK OFFERING [UTO]

Members of the Presiding Bishop's staff and a broad circle of leaders and partners worked to strengthen networks dedicated to community engagement, advocacy and direct action around poverty, especially via the United Thank Offering [UTO], Jubilee Ministries and Asset-Based Community Development.

CREATION CARE

Anglicans everywhere have promised to safeguard the integrity of creation and sustain and renew the life of the earth. The Presiding Bishop's staff worked closely with our counterparts on the Advisory Council on Stewardship of Creation (created via General Convention 2015 Resolution 2015-A030) to equip Episcopalians to extend loving, liberating and life-giving relationship to the earth. Here is a summary of action at the church-wide level;

- Creation Care Grants: An important tool for developing local eco-ministries
- Environmental Policy and Advocacy: The Episcopal Church's Office of Government Relations spearheaded significant work to protect creation and vulnerable people, including the Arctic National Wildlife Refuge in Alaska and the Dakota Access Pipeline at Standing Rock. The Episcopal Public Policy Network helped to mobilize thousands of Episcopalians to act for justice.
- ecoAmerica: The Church entered into a partnership with ecoAmerica, a Washington, D.C.-based group that is creating a new online resource hub, bulletin inserts, and regular policy and action opportunities in concert with ecumenical partners.
- United Nations Conference of Parties: The Episcopal Church delegation brought the voice of faith to UN deliberations in Marrakech, Morocco (2016) and Bonn, Germany (2017).

CREATION CARE IN 2019-2021

Further investment is essential in the next triennium, especially introducing a full-time staff officer working alongside an Advisory Council (the 2016-2018 triennium funded only one-third (1/3) of a staff officer and one quarter (1/4) of a staff associate to support this critical ministry). A commitment like

this would enrich and sustain the Church's currently disparate efforts, making possible such ministries as:

- Care of Creation Grants Program and Network: The grants program needs far more infrastructure, so that grantees receive not only funding but also accountability, coaching and the benefit of a healthy peer network.

- Regional Care of Creation Circles: These facilitated, community-wide gatherings would bring together scholars, activists, and local civic and church leaders to share strategies, build relationships and grow impact.

- Eco-Justice Sites: Church-wide leaders have identified sites in Alaska, Louisiana and the Dominican Republic, but relationships and work are still quite fresh. Work on these sites allows the Church to make change and learn together at the intersection of creation, racial and economic justice.

--The Rev. Canon Stephanie Spellers
Canon to the Presiding Bishop for Mission Priorities

Ministry Beyond the Episcopal Church

It is well known, though not always fully understood, that The Episcopal Church is one of thirty-nine (39) national or regional Churches or Provinces that together form a global Anglican Communion, the third largest group of Christians in the world.

 For much of its history, the Communion has been akin to a wheel, with the spokes all linked to one another only through the hub and its official Instruments. These include the Archbishop of Canterbury ("first among equals") the Lambeth Conference of Bishops (which meets approximately every ten (10) years), the Anglican Consultative Council (ACC, the only Instrument whose representatives are elected by their respective Churches), and the Primates Meeting (composed of the archbishops or presiding bishops of the member Churches).

In more recent years, however, the Communion has become something more like a web, with multiple unofficial and relational connections being made between the Churches directly with one another. This has occurred in the form of congregation-to-congregation links, diocese-to-diocese companion relationships, shared projects and Episcopal Church staff partnerships with other Churches, as well as diplomatic visits to other parts of the Communion.

In the past triennium, our Church has been represented officially through involvement in two (2) Primates Meetings by our Presiding Bishop and participation in the ACC by the President of the

House of Deputies, along with Bishop Ian Douglas of Connecticut and Rosalie Ballentine of the Virgin Islands. The Presiding Bishop has also served on a Primates Task Force on the Anglican Communion, while Bishop George Sumner of Dallas and Professor Robert Heaney of the Virginia Theological Seminary serve on the Lambeth Conference Planning Group.

By the time of General Convention, the Presiding Bishop will have engaged in substantive multi-provincial trips to Asia & the Pacific (2017) and Africa (2018), as well as separate trips to Jerusalem & the Middle East, West Africa, Scotland, and Canada. We also have attended the 50th anniversary celebration of the Anglican Centre in Rome. I have also traveled as an ambassador of the Presiding Bishop, to various other parts of the Communion, including Australia, New Zealand, Argentina, and various parts of Africa. I work closely with the Archbishop of Canterbury's office at Lambeth Palace, the Anglican Communion Office, and the Anglican Centre in Rome, and indirectly with these bodies through membership in the Council on Foreign Relations and various ecumenical organizations. And, of course, I work closely with our Global Partnerships Office, one (1) of the four (4) departments in our "Beyond" team, with Episcopal Relief & Development, and with Canon Michael Barlowe, Secretary of General Convention.

--The Rev. Canon C. K. Robertson, Ph.D.
 Canon to the Presiding Bishop for Ministry Beyond the Episcopal Church

OFFICE OF GLOBAL PARTNERSHIPS

The Office of Global Partnerships strives to work within a mutual and interdependent model with parishes, diocese and institutions of The Episcopal Church as we nurture relationships with our partners around the Anglican Communion, ecumenical and interreligious partners and with organizations such as the United Nations [UN]. We are grateful for the collaborative work with seminaries and dioceses who have expertise and understanding of Anglican Communion relationships and issues. Moving forward we hope to continue to develop these relationships as we strengthen networking opportunities. The mission mapping project is just one example of a program that connects partners with similar interests in an interactive online map of global relationships.

- In the past three (3) years, Global Partnerships has created the space to recruit a diversity of missionaries for assignments that range from a few months to a few years with the Episcopal Volunteers in Mission program which mirrors the Young Adult Service Corp (YASC) model of service. This creates opportunities for adults age thirty (30) plus to serve for six (6) months to one (1) year. YASC continues to grow, despite the fluctuating application numbers, and the program continues to strengthen and become more respected across the Anglican Communion.

- The missionary discernment, orientation, and reentry programs have been significantly enhanced by our partnership with The Order of the Holy Cross, which hosts and participates in the programs, and colleagues who specialize in lifelong formation and racial reconciliation

- Our work with the United Nations, informed by GC Resolution 2015-A020, includes an ongoing UN presence and Church wide engagement on issues such as gender equality, sustainable development, climate change, refugees/migration, human trafficking and more.

- Our ECOSOC (Economic and Social Council) consultative status, granted in 2014, has increased our access and amplified our advocacy, enabling us to send accredited delegations and make written and oral statements at UN meetings.

- The United Nations Commission on the Status of Women (UNCSW) attracts great attention with active participation from around one hundred (100) Episcopal Church and Anglican Communion members every year. This continues to be a valued opportunity to connect with our Anglican sisters around the world.

- Since 2015, we have organized an Episcopal presence at the annual UN Climate Change Conference of Parties meetings. This has been enhanced by our application and admission in 2017 as an observer organization to the UN Framework Convention on Climate Change, enabling us to send accredited observers.

Sustainable development has been a major focus within The Episcopal Church and with many of our partners around the Anglican Communion as we continue to learn from one another.

- The Province IX Sustainability work is ongoing, with resources and support being shared from a wide range of partners as we move through this multi-triennium program together. The program continues as planned through the upcoming 2019-21 triennium.

- Theological Education grants for Latin America and the Caribbean continue to support the work of formation and training of leaders for Anglican Partners in Mexico, Central America and Brazil and for Province IX dioceses.

- We are working closely with the Anglican Church of Mexico as the funding in our Covenant Agreement comes to an end in 2019, with a sustainability conference in 2017 and funding available for sustainability programming in 2018.

Relationships with partners around the Anglican Communion continues to develop through initiatives on many levels.

- The Galatians 6:2 conferences, which grew out of a Primates gathering in New York in 2014, has brought together Primates and practitioners from five (5) Provinces to work together on issues of mutual interest including theological education, sustainability and pension planning.

- Our missionaries continue to provide a constant link with our partners.

- New initiatives include a developing focus on theological education and climate change (disaster resilience) in the Pacific Rim region as we work alongside our partners in Asia and the Pacific.

- We continue to lift up the importance of churches in the Western world, including The Episcopal Church, maintaining a relationship with the Christians who live and work in the Holy Land as a vital link to our spiritual heritage as disciples of Jesus Christ.

- The Good Friday Offering continues to be an important tangible way to actively support Christians who live in the Holy Land and throughout the Middle East. The generosity of the Episcopalians throughout The Episcopal Church has provided $1,093,338 in the past three (3) years (2014, 2015, 2016). This is a remarkable outpouring of support and is the first time The Episcopal Church has been able to provide over $350,000 per year for three (3) years in a row.

OFFICE OF GOVERNMENT RELATIONS

Mission Statement:

The Episcopal Church Office of Government Relations [OGR] is part of the Ministry beyond the Episcopal Church, where we represent the public policy priorities of The Episcopal Church to the U.S. government in Washington, D.C. We aim to shape and influence policy and legislation on priority issues, highlighting the voices and experiences of Episcopalians and Anglicans globally. All of our work is grounded in the resolutions of General Convention and Executive Council. As a key component of our advocacy, we maintain the Episcopal Public Policy Network (EPPN) to educate, inform, and inspire Episcopalians to engage in advocacy.

Core work:

OGR continues to engage legislators, policymakers, and the broader Washington policy community in our priority areas of care of creation, reconciliation, and evangelism. In the context of public policy, this has meant advocacy focused on **environmental stewardship** and climate change. For reconciliation, we engage on issues of **racial justice, peacemaking, and international development**, in close consultation and in support of our Anglican Communion partners. For evangelism, we understand the imperative to become the beloved community, and focus our advocacy efforts on **refugees and immigration**.

We work with ecumenical and interfaith partners in coalition, such as the Interfaith Immigration Coalition, Interfaith Working Group on Foreign Assistance, Refugee Council USA Advocacy Committee, and Creation Justice Ministries. We have built strong relationships with secular advocacy networks and NGOs on issues such as criminal justice reform, food security, immigration and LGBT rights. We regularly sign on to letters and statements, send letters to Congress and the Administration, and conduct quiet outreach to advocate for Church resolutions.

We continue to cultivate relationships with legislators and their staff and to expand relationships with officials from the White House, the U.S. Department of State, U.S. Agency for International Development and other U.S. government departments and agencies. We initiated monthly worship with Episcopal members of Congress, building close relationships with the forty (40) Episcopal member offices. We help to shape and influence policy discussions through participation in panels and workshops at think tanks and universities, and we have authored policy papers and blog posts in numerous policy and ecumenical publications.

Pray, Fast, Act Campaign:

Along with ELCA and ecumenical partners through the Circle of Protection, we launched a campaign called: For Such a Time as This: Prayer, Fasting, and Advocacy. This #PrayFastAct campaign highlights the importance of federal funding for anti-poverty programs and foreign assistance that help the most vulnerable. We will continue sharing monthly alerts and resources through the 115th Congress.

EPPN:

Through the Episcopal Public Policy Network, we have engaged Episcopalians on healthcare, refugee resettlement, immigration and Deferred Action for Childhood Arrivals, foreign assistance, famine relief, budget programs that support low-income Americans, and critical environmental issues. We have held **webinars on Sanctuary** and developed toolkits to support Episcopal parishes and dioceses, as well as providing resources and conducting trainings on refugee resettlement. We have also engaged on gun reform, human trafficking, temporary protected status and criminal justice reform.

EPISCOPAL MIGRATION MINISTRIES

Episcopal Migration Ministries (EMM), part of the Ministry beyond the Episcopal Church and a core ministry of reconciliation and The Jesus Movement, engages a public-private partnership to resettle and minister to refugees – those who have had to flee their homes because of war, violence, or persecution.

The Episcopal Church has been welcoming refugees to the United States since the 1930s. As one of only nine (9) organizations currently partnered with the federal government to resettle refugees, EMM has a valuable place at the table and serves as an important prophetic voice for both national and international migration issues.

EMM's resettlement ministry is focused in the following four (4) areas, working hand in hand with a nation-wide network of affiliate offices:
1. The *Reception & Placement* program, serving refugees during their first ninety (90) days in the United States. In the years 2016 and 2017, EMM welcomed nearly ten thousand (10,000) women, children and men to the safety of our shores through this program.
2. The *Matching Grant* program, an intensive employment case management program which aims to have refugees fully employed and self-sufficient within one hundred and eighty (180) days of enrollment as an alternative to public assistance.

3. The *Preferred Communities* program, an intensive medical and mental health case management program which serves refugees in particular communities across the United States that are able to care for such special health needs.

4. A program of *education and engagement,* providing training for affiliate offices, reporting stories of changed lives, and making presentations to dioceses, congregations, communities, and other groups.

That fourth area, education and engagement, has become a place of particular focus for EMM in the current triennium. The United Nations High Commissioner for Refugees has tracked the current number of refugees having fled their home countries at more than twenty-two (22) million; when adding in those who are forcibly displaced within their own countries, the number grows to over sixty-five (65) million. As the world is learning more and more about what is the largest refugee crisis in history, communities all across The Episcopal Church are seeking opportunities to get involved in this life-saving ministry.

Webinars, panel discussions, and direct engagement with dioceses and churches by EMM staff have become frequent offerings and serve as resources for others. (An archive of this work is available on www.EpiscopalMigrationMinistries.org.) A three (3) day training workshop, *Love God, Love Neighbor*, was developed with funding from a Constable grant – these interactive seminars provide the tools to understand refugee resettlement and to advocate effectively on behalf of refugees. And, a network of communities not directly involved in resettlement, *Partners in Welcome*, was launched in late 2017 to invite, encourage, and equip congregations, dioceses, and institutions for ministry among refugees. *Partners in Welcome* offers an opportunity for the whole of The Episcopal Church to be an integral part of this work.

For more information, please visit www.EpiscopalMigrationMinistries.org.

OFFICE OF ECUMENICAL AND INTERRELIGIOUS RELATIONS

Mission Statement:

The Office of Ecumenical and Interreligious Relations [EIR] is part of the Ministry beyond The Episcopal Church and a core ministry of reconciliation and The Jesus Movement. The EIR represents the Presiding Bishop and The Episcopal Church in its ecumenical and interreligious engagements: bilateral dialogues and coordinating committees; conciliar and interfaith bodies; work with domestic, Anglican Communion and international and UN faith-based bodies notably on peace building and creation care (Korea, Congo, the Philippines, Myanmar). Emerging ecumenical partnerships include a racial justice roundtable and work on religious literacy. The office works in collaboration with all staff departments to offer ecumenical and interreligious resources as well as with the network of Episcopal Diocesan Ecumenical and Interreligious Officers [EDEIO]. Building bridges with our ecumenical and interreligious partners, we seek both the unity of the church and ways to live and work together for peace in the world.

Dialogues and Coordinating Committees

- Increasing shared ministries with full communion partners, the Evangelical Lutheran Church in America and the Moravian Church, including joint advocacy, and commemoration of the 500th anniversary of the Reformation.

- The Anglican-Roman Catholic Dialogue in the United Sates completed a joint statement on Ecclesiology and Moral Discernment (https://www.episcopalchurch.org/library/document/ecclesiology-and-moral-discernment-statement-anglican-roman-catholic-theological). The current round of dialogue focuses on Reconciliation in Holy Scripture and Christian Tradition.

- The United Methodist-Episcopal Church Dialogue submitted a draft proposal for full communion (https://www.episcopalchurch.org/library/document/gift-world-co-laborers-healing-brokenness). Regional meetings and exchanges are planned for the next triennium.

- Presbyterian dialogue work has underscored shared mission and ministry.

- There is ongoing partnership with Philippine Independent Church [IFI], including a renewal of the Concordat.

Anglican Communion

- Informal discussions with the Evangelical Lutheran Church in Germany convened by the Convocation of Episcopal Churches in Europe, in collaboration with the Anglican Communion Office and the ELCA. Discussions with Porvoo churches and Canadian and ELCA counterparts on mutual recognition of agreements as follow-up to Anglican Consultative Council requests for this work.

Conciliar and Ecumenical Interreligious Bodies

- **National Council of Churches**: Interreligious convening tables hosting Buddhist and Sikh dialogue groups. Christian-Muslim and Christian-Jewish conversations are ongoing. We partner with the NCC on Capitol Hill and join in advocacy, especially in connection with climate change.

- **World Council of Churches:** Response to *Church Toward a Common Vision* continues along with Pilgrimage of Justice and Peace with emphasis on Anti-Racism and Afro-Phobia.

- **Christian Churches Together** broad church family membership—Evangelical, Pentecostal, Orthodox, Roman Catholic, Protestant, etc. Continuing work civil conversations, religious persecution.

- **Churches Uniting in Christ** (CUIC, formerly COCU). A Service of Mutual Recognition of Ministries held Pentecost 2017 in Dallas, Texas. PB present. Forum on racism and poverty.

- **The National Workshop on Christian Unity** has emerged as growing gathering place for ecumenical partners and is in process of expanding.

Interreligious

- **Religions for Peace** Current work on grass roots organizing, Peace education and engaging local faith bodies in combatting Islamophobia. New Director now on board. 2016 focus on Asia interreligious gathering on peacebuilding in Myanmar with the ACC and WCC.

- **Discover Islam** In partnership with the ELCA and the Islamic Society of North America, DVD sets and study guides on Islam were sent to all ecumenical officers and bishops. They are also available free on request.

2018-2021 Triennium

The 2018-2021 Triennium will emphasize our work with the United Methodists and in interreligious partnerships.

Indices

SELECTED ABBREVIATIONS & ACRONYMS USED IN THE BLUE BOOK

ACA—Affordable Care Act
ACC—Anglican Church in Canada or Anglican Consultative Council
ACTII—All Congregations Together
AME—African Methodist Episcopal Church
ARC—Assessment Review Committee
ARCT—Anti-Racism Certification Training
ASA—Average Sunday Attendance
BBLSM—Blue Book Liturgy Supplemental Materials
BCP—Book of Common Prayer
BREEAM—Building Research Establishment Environmental Assessment Method
CCSR—Committee on Corporate Social Responsibility
CETALC—Commission for Theological Education for Latin America and the Caribbean
CFR—Center for Reconciliation
CGC—Central Gulf Coast (Diocese of Central Gulf Coast)
CPF—Church Pension Fund
CPG—Church Pension Group
CPI—Church Publishing Incorporated
CRU—Commission on Racial Understanding
DB—Defined Benefit
DC—Defined Contribution
DEPO—Designated Episcopal Pastoral Oversight
DFMS—Domestic and Foreign Missionary Society
DHP—Denominational Health Plan
DTM—Diocesan Transition Minister
DWCF—Denver Womens' Correctional Facility
ECC—Episcopal Church in Cuba
ECCAR—Executive Council Committee on Anti-Racism
ECIC—Executive Council Investment Committee
ECW—Episcopal Church Women /National Episcopal Church Women
EJI—Equal Justice Initiative
EJLC—Economic Justice Loan Committee
ELCA—Evangelical Lutheran Church in America
ELMC—Episcopal Latino Ministry Competency
EMM—Episcopal Migration Ministries
EPC—Episcopal Priest Couples
ESCRU—Episcopal Society for Cultural and Racial Unity
ESG—Environmentally, Socially and Governmentally
EYE—Episcopal Youth Event
FFM – Finances for Mission (Joint Standing Committee on Finances for Mission)
GAM— Governance & Administration for Mission (Executive Council Joint Standing Committee on Governance and Administration for Mission)

GBV—Gender Based Violence
GC—General Convention
GCO—General Convention Office (Executive Office of the General Convention)
GOE—General Ordination Exam
HBCU—Historically Black Colleges and Universities
IARCA—Iglesia Anglicana de la Región Central de America
HoB—House of Bishops
HoD—House of Deputies
ICPP—International Clergy Pension Plan
JSCN—Joint Standing Committee on Nominations
LEED—Leadership in Energy and Environmental Design
LHM—Latino/Hispanic Ministry
LMM— Local Ministry & Mission (Executive Council Joint Standing Committee on Local Ministry and Mission)
MEZ—Mission Enterprise Zones
MDG—Millennium Development Goals
OFAC—Office of Foreign Assets Control
OGR—Office of Government Relations
ORCA---Off-Grid, Renewable and Climate Action (Developing World Market's Off Grid, Renewable and Climate Action Impact Note)
OTM—Office for Transitional Ministry
PB&F—Program, Budget and Finance (Joint Standing Committee on Program, Budget and Finance)
PLC—Provincial Leadership Conference
RISE—Rising Stars Experience
RSVP—Retirement Savings Plan
SACSCOC—Southern Association of Colleges and Schools Commission on Colleges
SCSGCC—Standing Commission on Structure, Governance, Constitution and Canons
SCLM—Standing Commission on Liturgy and Music
SDG—Sustainable Development Goal
SMART—Specific, Measurable, Attainable, Realistic and Time-Limited
SNCC—Student Nonviolent Coordinating Committee
SRI—Socially Responsible Investing
TC—Transition Committee
TCTCV—*The Church: Towards a Common Vision*
TEC—The Episcopal Church
TIPS—Treasury Inflation Protected Securities
TREC—Task Force for Reimagining The Episcopal Church
UTO—United Thank Offering
VEBA—Voluntary Employees' Beneficiary Association
WACI- Weighted Average Carbon Intensity
WCC—World Council of Churches

INDEX OF PROPOSED RESOLUTIONS