The Episcopal Church

Reports to the

80th General Convention

Otherwise known as

The Blue Book

Volume 3

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

Office of the General Convention
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New York, New York 10017

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TASK FORCE ON CARE OF CREATION & ENVIRONMENTAL RACISM

Membership

The Rev. Stephanie Johnson, *Chair*	Connecticut, I	2021
The Rt. Rev. David Rice, *Vice-Chair*	San Joaquin, VIII	2021
Mr. Tyler Kerr, *Secretary*	Kansas, VII	2021
The Rev. Richard Acosta	Colombia, IX	2021
The Rt. Rev. Cathleen C. Bascom	Kansas, VII	2021
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The Rev. Nathan Empsall	Spokane, VIII	2021
The Rt. Rev. Robert Fitzpatrick	Hawaii, VIII	2021
The Rev. P. Joshua Griffin	California, VIII	2021
Dr. Delia Heck	Southwestern Virginia, III	2021
The Rt. Rev. A. Robert Hirschfeld	New Hampshire, I	2021
Ms. Perry Hodgkins Jones	Western North Carolina, IV	2021
The Rt. Rev. Mark Lattime	Alaska, VIII	2021
The Rev. Lester Mackenzie	Los Angeles, VIII	2021
The Rev. Hershey Mallette Stephens	North Carolina, IV	2021
The Rev. Weston Mathews	Virginia, III	2021
The Rev. Canon Dimas Munoz	Puerto Rico, IX	2021
Ms. Sarah Nolan	Virginia, III	2021
The Rev. Simeon Lewis Powell, CG	Northern California, VIII	2021
The Very Rev. Dr. W. Mark Richardson	California, VIII	2021
Mr. Brian Sellers-Petersen	Olympia, VIII	2021
Dr. Andrew Thompson	East Tennessee, IV	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

Resolutions 2018-A011 & 2018-A013

2018-A011 Oppose Environmental Racism

Resolved, the House of Deputies concurring, That the 79th General Convention affirm the need for governments, private industry and all people to act to protect the health of all persons from unsafe and unhealthy exposures to air and water pollution, toxic substances, or radiation in their food, water supply, living quarters, and work places; and be it further

Resolved, That the Church recommit to the excellent work done by previous General Conventions of The Episcopal Church, specifically resolutions 2000-D005, 2012-B023, 2012-C079, and 2015-C013 and that General Convention affirm that no community, especially poor communities, those who live closest to the land in subsistence cultures, and members of marginalized ethnic groups, should bear a disproportionate risk of environmental pollution or degradation; and advocate for and support policies that protect these populations and the sanctity of communities and the livelihood of future generations from the disparate impact of climate change and environmental degradation; and be it further

Resolved, that General Convention direct the formation of a Task Force, not to exceed twelve people, including attorneys, health professionals, environmental professionals, and bishops and other clergy to study and report specific recommendations for appropriate changes in federal, state, or local law so that effective judicial remedies, based on a showing of disproportionate health or environmental impact on those living closest to the land in subsistence cultures, ethnic minorities or poor communities, can be obtained to address unwise governmental decisions with respect to land use, industrial, energy and transportation development, and application of environmental standards; and be it further

Resolved, The Task Force will report to Executive Council by the end of 2019.

2018-A013 Facilitating the Development of the Church's Ministry of the Care of Creation

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

Resolved, That, as disciples of Jesus Christ, we recognize that the Earth is the Lord's (Psalm 24), has been made in and through Christ (John 1) and we are placed in it as a garden planet (Genesis 2); and be it further

Resolved, That the General Convention urge the establishment of an additional senior staff position for the Care of Creation as a member of the Episcopal Church Center staff; and be it further

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

Resolved, That the 79th General Convention authorize a Task Force for the Care of Creation to develop this aspect of the ongoing mission and ministry of The Episcopal Church; and be it further

Resolved, That this Task Force of up to 20 persons be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with members to include a geographically diverse representation from the Church mindful to include younger generations, people of color and native persons who are and will be disproportionately affected by climate change; and be it further

Resolved, That this Task Force work during the period of 2018-2021 and submit a report to the 80th General Convention; and be it further

Resolved, That the Task Force shall develop and refine the small grants program begun by the 2015-2018 Advisory Council for Stewardship of Creation to support local and regional eco-ministry efforts; engage eco-justice site projects, and further develop creation care networks based on bioregions (a region defined by characteristics of the natural environment rather than by human-made divisions) and/or areas of affinity, (e.g. renewable energy, regenerative agriculture, liturgy, Christian formation); and be it further

Resolved, That the staff person for the Care of Creation shall liaise with and support the work of the Task Force for the Care of Creation; and be it further

Resolved, That the Task Force shall receive and help disseminate case studies and best practices in keeping with the spirit of the Paris Climate Accord, that is, supporting humanity's transition from industrial life to sustainable life; and be it further

Resolved, That the General Convention recommend to the President of the House Deputies and the Presiding Bishop in consultation with the Task Force to establish and to appoint persons to a Theology of Creation Working Group tasked with facilitating innovative educational offerings in environmental ethics and theology for the formation of clergy and laity.

Summary of Work

The TFCCER was tasked to respond to two resolutions noted above. The Task Force which was convened folded in the Task Force on Environmental Racism and the Theology of Creation Working group.

The TF had their initial meeting in November 2018 in Maryland. At this meeting we shared our personal stories of faith, hope and care for creation, while outlining steps for our future work. While in those meetings, devastating fires raged in California near a church where one of our members served. In ways that would shadow future meetings and our work, we were deeply personally aware about the ravages of climate change. The second and final in person meeting was in Salt Lake City in November 2019. We spent time in prayer and reflection, sharing our stories and dreaming of new possibilities for the church and God's creation. We were very intentional at that meeting to spend time focusing on the pastoral and practical needs for a just transition away from fossil fuel, recognizing the need to be responsive and caring to the entire church. We had hoped to make that work one of our priorities in our final year along with our ecojustice efforts. However, the pandemic, upended much of that planning and visioning.

Throughout the triennium the entire TF met via zoom for 14 meetings. Our efforts were on forming individual working groups on three areas: environmental racism and ecojustice, networking and grants, and theology. We initially spent much time on our work around eco-justice and environmental racism, including fruitful conversation about the Episcopal Church's website and the glossary. In parallel, work began on revising the grants program with opportunities for large Impact grants. The carbon offset program, also detailed below, was an important area of focus which we had been excited to launch until the pandemic hit.

These groups met independently of the TF to advance their projects. Reports from each of these working groups are given below.

We were also tasked with evaluating and helping to develop unfunded resolutions from the 79th General Convention, using a budget line for these projects. Those projects included the following:

- Resolution 2018-C008, supporting the use of a web-based carbon tracker designed by the Diocese of California. The task force agreed to commit $30,000 to this project.
- Resolution 2018-A018, supporting the Episcopal Church's participation in the United Nations Conference of Parties. The task force agreed to support that participation at a reduced level from previous years and to encourage a public application process for selecting participants.
- Resolution 2018-A014, creating a carbon offset program for the Episcopal Church. This resolution is addressed below.

- Resolution 2018-D053, creating a survey of church-owned lands and making recommendations for creation care of the lands. Plainsong Farms was funded to begin many aspects of this project and began mapping church-owned lands in three dioceses, plus is developing a toolbox for other dioceses to use. The Task Force recommended that Executive Council approve $20,600 for this work which moved forward. The Task Force believes that moving forward this work can be aligned with the Asset Mapping for eco-justice.
- Resolution 2018-A213, a survey of energy and water efficiency in church buildings. The task force was unable to advance this project.
- Resolution 2018-D081, helping communities affected by change in energy use. The task force explored ways to advance this work with a variety of approaches; however, the planning work was slowed by the pandemic, but was unable to develop specific projects.

Environmental Racism/Environmental Justice Working Group

General Convention Resolution 2018-A011 called for the formation of a task force to address environmental injustice (the unequal distribution of environmental harms) and environmental racism (the systemic disproportionate imposition of environmental harms on communities of color specifically). This task force was subsequently combined with the task force addressing creation care to form the Task Force for Care of Creation and Environmental Racism (TFCCER), which then formed a working group specifically focused on environmental racism and environmental injustice.

The work of the Working Group on Environmental Racism and Environmental Justice focused on strengthening existing projects and networks through story-sharing and asset mapping. The group partnered with the Episcopal Asset Map to enhance the capabilities of the map in order to highlight areas of environmental injustice and racism and to facilitate partnerships with environmental justice organizations. In order to support environmental justice work on parish and diocesan levels, the working group developed a Care of Creation Glossary with an emphasis on various forms of environmental injustice and environmental racism. It also collaborated with the Office of the Presiding Bishop to develop a Creation Care Covenant with specific suggestions for "Loving Formation," "Liberating Advocacy," and "Life-Giving Conservation" and with a central role for the Asset Map. The group also helped reformat the Episcopal Church's Creation Care website.

In its networking efforts, the Working Group on Environmental Racism and Environmental Justice formed partnerships with Repairers of the Breach, the National Black Environmental Justice Network, the Southeast Climate & Energy Network, Southeast Faith Leaders Network, Tennessee State University, St. Augustine University and Ferrum College to provide training on using the

Episcopal Asset Map for community engagement surrounding environmental concerns. In the context of this work, a proposal was drafted to develop and implement trainings for utilizing the asset map for environmental justice work and a toolkit for dioceses to establish their own environmental justice ministries. In December 2020, a pilot training was offered to five dioceses to test the use of mapping and discuss community organizing opportunities. It was agreed that these dioceses would continue to work on the asset maps with specific mapping layers that would provide important information for their eco-justice work. The staff at the Episcopal Church will be responsible for moving these efforts forward.

Theology Working Group

Resolution 2018-A008 tasked the TFCCER with forming a Theology of Creation Working Group to facilitate education in creation theology. With mandate this in mind, the working group collaborated with the editors of The Anglican Theological Review to compile a special thematic issue of the ATR entitled "All Things Hold Together: Intersections in Creation Care." The issue is guest co-edited by Andrew Thompson and Sarah Nolan and includes a preface by Presiding Bishop Curry and articles in two languages and from a variety of diverse perspectives.

The articles in the issue include a study of social and environmental justice themes in the Bible by Colombian theologian Richard Acosta (published in English and Spanish); a political-economic examination of food security in the Biblical story of Joseph from Baptist minister and public health graduate student Darriel Harris; a critique of settler colonialism in society and in the church from First Nations priest and activist Rachel Taber Hamilton; the story of the radical Charis Community from cofounder Grace Aheron; a reflection on ecological grief and healing rituals in the diocese of New Hampshire from Bishop Rob Hirschfeld and Stephen Blackmer; insights from years of preaching on climate change from Margaret Bullitt-Jonas; and book reviews by Shadreck Kwagwanji, Allen Doyle, Perry Hodgkins Jones, and Andrew Sloane. The issue is scheduled for release in Spring 2021.

Networking and Grants Working Group

As part of its mandate under General Convention Resolution A013, the Task Force on Care of Creation and Environmental Racism was tasked with administering a small-grants program to facilitate care of creation ministries and eco-justice projects on local and regional levels and to develop a network of such ministries. As of this writing, one granting cycle has been completed, and a second is underway.

The first cycle was launched in the fall of 2019, and grants were awarded in early 2020. During this cycle, grants were solicited in two categories: Seed Grants (awards up to $5000) and Impact Grants (awards up to $20,000). Over 54 grant proposals were received representing over $680,000 in funds requested. After an extensive review process 18 Seed Grants were funded, for a total of $86,824.00, and 8 Impact Grants were funded, for a total of $93,000.00 The overall total granted in the first round was $179,824.00. Projects ranged from small church based efforts to engage the local community in gardening and food justice projects, to larger projects re-envisioning use of land for green burials and native plant restoration.

The second cycle was launched in February 2021. For this second cycle, the Task Force is soliciting proposals for Impact Grant ranging from $15,000 to $40,000, with the expectation of funding ten or fewer projects from an available total of $170,000. Grants will be awarded to long-term, collaborative projects that respond to issues of environmental racism and ecojustice by engaging in advocacy, civic engagement and developing climate resiliency. In this cycle, the Task Force will provide resources for faith-based community organizing and theological reflection and response concerning the sin of environmental racism, and for reconciliation informed by the concept of environmental reparations. Priority will be given to efforts which are supported and led by youth and young adults, communities of color and indigenous peoples. Grants will be awarded in April of 2021.

This small grants project is a means not only of supporting innovative creation care ministries, but also of the essential task of building a broad network of individuals, congregations, communities, and dioceses involved in such ministries. After multiple grant cycles in this triennium and the previous one, the Task Force has been able to compile a list of ministries that will form the foundation for an initial stage of formal network building, to be maintained in part by a monthly creation care newsletter.

Offset Project

General Convention Resolution 2018-A014 called for the development of a proposal for a Carbon offset program for The Episcopal Church, with provision for a future program for the dioceses and parishes of the broader church.

Carbon offsetting is a process whereby individuals and organizations can, in a sense, reduce their net carbon impact. In the context of the current crisis, it is absolutely essential that everything possible be done to actually reduce greenhouse gas emissions by such measures as reducing air travel and using renewable sources of energy. In our participation in God's mission, however, not all emissions are avoidable, and air travel in particular represents a large source of greenhouse gas emissions in the work of the church. In this situation, offsetting can be a way to balance such unavoidable emissions by purchasing a matching quantity of "negative emissions"; that is, by financially supporting projects that remove carbon dioxide and other greenhouse gasses from the atmosphere (such as tree-planting, or "carbon forestry") or reduce emissions in other areas (such as providing more efficient cookstoves). In order to be effective, offset programs require significant monitoring and accountability to ensure that the net total of emissions is actually being reduced. For example, program supervisors would need to verify that the negative emissions being purchased are actually occurring and would not be occurring without the purchase of offsets (this characteristic is referred to as "additionality"), and that they are permanent.

The Task Force for the Care of Creation and Environmental Racism (TFCCER) developed a proposal for the use of carbon offsetting for the church's unavoidable greenhouse gas emissions, particularly those from air travel. This proposal involved a multifaceted approach combining combining four potential sources of offsets: (1) Episcopal Relief and Development's carbon forestry and rice cultivation projects in the Philippines; (2) The University of the South's (Sewanee's) carbon forestry and coffee farming project in Haiti; (3) a domestic carbon forestry initiative to be developed;

(4) third-party offset agencies, such as CoolEffect. By drawing on existing Episcopal Church programs and relationships, these options maximize opportunities for true accountability, education, and communion.

In order to establish an effective carbon offset program in fulfillment of 2018-A014, TFCCER recommended the allocation of $25,000. Of this amount, $15,000 was to be budgeted to cover wages and benefits for a part-time Offset Specialist. This individual would work to design and implement a comprehensive offset program, based on extensive research already done, combining the four options described above. In order to implement this program, the Offset Specialist would also need to track offset payments from DFMS personnel and offices, monitor offset projects, and provide reports to the Task Force. Finally, the Offset Specialist, in collaboration with the Task Force, would design and implement a communication strategy to educate church personnel on the importance of carbon offsetting as a theological practice. The remainder of the funding, $10,000, would have been budgeted for implementing the anticipated communication strategy through virtual and printed information and expenses for meetings and speaking opportunities.

In addition to the budgeted amount of $25,000 for program implementation, a program to offset travel emissions would require TEC to set aside funds to offset approximately 3500 tons of carbon dioxide equivalent (CO_2e) per year. While offset prices vary significantly, a rate or $20/ton CO_2e is recommended for a combination of the four sources mentioned above.

Unfortunately, the Coronavirus pandemic and resulting financial limitations in early 2020 prevented the implementation of this proposal.

Proposed resolutions

A086 Continuing the Task Force for Care of Creation and Environmental Racism

Resolved, the House of _________ concurring, That the General Convention affirm the Presiding Bishop's and the President of the House of Deputies' continued call to the Church to recognize Care of Creation and Environmental Justice as integral and ongoing parts of the Church's loving, liberating, and life-giving work; and be it further

Resolved, That the General Convention commend the good work done by the Task Force for Care of Creation and Environmental Racism in the triennium following the 2018 General Convention; and be it further

Resolved, That the General Convention authorize a Task Force for Care of Creation and Environmental Racism to continue this work on behalf of the Episcopal Church in the next triennium; and be it further

Resolved, That this Task Force of up to 20 persons be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with members to include a geographically diverse representation from the Church mindful to include younger generations, persons of color and Native persons who are and will be disproportionately affected by climate change; and be it further

Resolved, That this Task Force submit a report to the 81st General Convention; and be it further

Resolved, That the General Convention direct this Task Force to make as a priority the development and support of programs that respond to eco-justice concerns, address systemic environmental racism, and work to alleviate environmental burdens on indigenous communities. Ensure that programs can be modeled across the provinces of the Episcopal Church; and to provide training and financial and other resources to facilitate these projects; and be it further

Resolved, that the General Convention directs the Task Force to further expand, support and promote the Creation Care Covenant recognizing that this work seeks to align with the loving, liberating and life giving work of evangelism and beloved community.

Resolved, that the General Convention direct the Task Force to continue its work on developing theological resources and materials on a range of environmental topics including but not limited to the sin of environmental racism, an exploration of environmental reparations and the ethical and moral implications of responding to climate change: and be it further

Resolved, That the General Convention direct this Task Force to continue the work of the previous Advisory Council (GC 2015) and Task Force (GC 2018) to implement the carbon offset program, support the efforts for just transition, increase and utilize the capabilities of the Episcopal Asset Map to support and respond to environmental injustices and to establish the network of asset-based programs; to continue to work within the partnerships established in the previous triennium with environmental justice organizations nationwide; and to continue the grants program in order to accomplish the above objectives; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $850,000 during the triennium for the work outlined above.

A087 Net Carbon Neutrality by 2030

Resolved, the House of _________ concurring, That the Episcopal Church commit to a goal of net carbon neutrality in its operations and the work of staff, standing commissions, interim bodies, and General Convention by 2030, through a combination of reducing emissions from travel, reducing energy use, increasing energy efficiency in buildings, and purchasing offsets from duly investigated, responsible, and ethical partners; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to take concrete actions to reduce fossil fuel emissions from travel by said groups, such as through online meetings or regional gatherings; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to draft a policy to offset one hundred percent of fossil fuel emissions from unavoidable travel by said groups, either through an internal offset program or through purchase from duly investigated, responsible, and ethical partners, with appropriate accountability and oversight; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $70,000 per year for the implementation of this resolution, taken from existing travel budgets, in order to offset approximately 3500 tons of carbon dioxide equivalent (the average annual travel emissions of said groups from previous years) at a rate of $20 per ton; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to establish an internal offset program including such activities as carbon forestry and regenerative agriculture, with appropriate oversight to ensure that the program meet the five commonly accepted traits of responsible offset programs: real, permanent, verifiable, additional, and enforceable; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $25,000 to establish this internal offset program, comprising $15,000 to cover wages and benefits for a part-time Offset Specialist and $10,000 for implementation and promotion of the program; and be it further

Resolved, that the General Convention encourage parishes, dioceses, schools, camps, and other Episcopal institutions to pursue their own goal of net carbon neutrality by 2030 through a combination of reducing emissions from travel, reducing energy use, increasing energy efficiency in buildings, and purchasing offsets from duly investigated, responsible, and ethical partners; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to develop and share resources for parishes and dioceses to commit to and work toward this goal, such as the online carbon tracker already created by the Diocese of California, as well as other online and print resources; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $50,000 to fund the development and promotion of these resources.

A088 Commit to the Pressing Work of Addressing Global Climate Change and Environmental Justice

Resolved, the House of _________ concurring, That the 80th General Convention recognize as the Episcopal Church's position that global climate change is not only a scientific concern or environmental issue, but what the United Nations calls "the defining issue of our time... at a defining moment" (UN Secretary General, September 10, 2018), an all-encompassing social crisis and moral emergency that impacts and interconnects every aspect of pastoral concern including health, poverty, employment, racism, social justice, and family life and that can only be addressed by a Great Work involving every sector of society, including the Church; and affirm the commitment of the 79th General Convention to the House of Bishops' 2011 Pastoral Teaching on the Environment as an official position of the church; and be it further

Resolved, That the Church recommit to the work done by previous General Conventions of The Episcopal Church on the pressing moral dimensions of global climate change and environmental justice, including resolutions 2000-D005, 2012-B023, 2015-C013, 2015-C045, 2018-A011, 2018-A018, 2018-A020, 2018-B027, 2018-C020, 2018-C021, and 2018-C064; and that General Convention reaffirm that the Episcopal Church shall support and advocate for policies, programs, pastoral responses, and theologies that work to ensure no community - especially financially impoverished communities, frontline residents, migrants, and BIPOC communities (Black, indigenous, and people of color) - shall bear a disproportionate impact of the environmental, health, and economic threats of climate change; and be it further

Resolved, That General Convention affirm the decision of the United States federal government to rejoin the Paris Climate Accord, while recognizing that the goals set forth in the Paris Accord are only a first step, insufficient in and of themselves to fully contain rising global temperatures and their impacts; and that General Convention direct the Presiding Bishop's staff to continue, through our ongoing role as observers at the United Nations, to participate in all meetings of the Conference of Parties (COP) to the United Nations Framework Convention on Climate Change during the next triennium via delegations selected from an applicant pool and made up primarily of Episcopalians from financially impoverished communities, frontline locations, and BIPOC communities; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $20,000 per triennium to support costs associated with travel to the COP conferences by delegation members who are not members of the Presiding Bishop's staff; and be it further

Resolved, That the Episcopal Church direct the Office of Government Relations and the Episcopal Public Policy Network to advocate for legislation and other public policies that directly address the impact of climate change among marginalized, indigenous, and frontline communities and that tangibly and financially assist those communities with the costs of both climate change and mitigation, and policies that prohibit the authorization and construction of new fossil fuel infrastructure including but not limited to coal, oil, or gas leases on public lands, all forms of mountaintop removal mining, and tar sands pipelines such as Keystone XL, Enbridge Line #3, and the Dakota Access Pipeline; and be it further

Resolved, That General Convention encourage all Church communities, especially parishes, dioceses, camps, conference centers, schools, and chaplaincies, to learn more about the pressing moral implications of climate change in their regions and existing local organizing efforts, then advocate for policies and solutions to address those local needs utilizing and adapting advocacy resources from General Convention and the Presiding Bishop's staff including the Episcopal Public Policy Network, asset map, carbon tracker, liturgical resources, and advocating at the local and state level, and incorporating local nature, environmental justice, and advocacy for creation care into all aspects of community life and Christian education.

A089 Resolution on Divestment & Just Transition

Resolved, the House of __________ concurring, That the General Convention, affirming resolution 2015-C045 and 2018-D081, direct the Episcopal Church and urge the Church Pension Fund to continue to divest all funds from fossil fuel companies and mutual funds including fossil fuel companies, including but not limited to natural gas, oil, coal, and fracking, by 2025 and that these divested funds be reinvested in renewable energy funds and that no fossil fuels funds be purchased in the future, and be it further

Resolved, that dioceses and congregations continue to explore the moral and ethical benefits of divesting from fossil fuel and reinvesting in renewable energy and support their fund managers to act on divestment and reinvestment and be it further.

Resolved, that the General Convention, also affirming resolution 2018-D081 and recognizing that many of our communities and congregations have been grown and sustained by fossil fuel industries, urge a pastoral and practical approach to just transition to new economies, and direct the Episcopal Church staff to form partnerships with existing just transition organizations to support our dioceses and congregations; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $35,000 during the triennium to facilitate this collaborative work around just transition, and be it further

Resolved, that the General Convention direct the Office of Governmental Relations to advocate for and support public policies that support a just transition for fossil fuel dependent communities.

Continuance recommendation

See Resolution A086 which would continue this task force.

TASK FORCE ON CHURCH PLANTING AND CONGREGATIONAL REDEVELOPMENT

Membership

The Rev. Canon Janet Waggoner, *Chair*	The Episcopal Church in North Texas, VII	2021
The Rt. Rev. Allen Shin, *Vice-Chair*	New York, II	2021
Mrs. Natalie Thomas, *Secretary*	Massachusetts, I	2021
The Rt. Rev. Jennifer Brooke-Davidson	Virginia, III	2021
Mr. Jason Evans	Texas, VII	2021
Canon Katie Forsyth	Eastern Michigan, V	2021
The Rev. Canon Betsy S. Ivey	Pennsylvania, III	2021
The Very Rev. Dr. Gray Lesesne	Indianapolis, V	2021
Dr. Gandhy Lopez	Colorado, VI	2021
Ms. Caroline McCall	California, VIII	2021
The Very Rev. Amy McCreath	Massachusetts, I	2021
The Rev. Eric Metoyer	California, VIII	2021
The Rev. Canon Dan Morrow	Central Pennsylvania, III	2021
The Rt. Rev. Gretchen Rehberg	Spokane, VIII	2021
The Rt. Rev. Alan Scarfe	Iowa, VI	2021
The Rev. Michael Sells	Navajoland Area Mission, VIII	2021
The Rev. Daniel Velez-Rivera	Virginia, III	2021
The Reverend Canon Dr. Ada Wong Nagata	Los Angeles, VIII	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

Resigned:
The Right Rev. Mariann Budde, Washington, III 2021

Members, inactive:
Dr. Gandhy Lopez Colorado, VI 2021
The Rt. Rev. Jennifer Brooke-Davidson, Virginia, III 2021

Acknowledgements

We express our deep gratitude to the Rev. Canon Stephanie Spellers, the Rev. Tom Brackett, the Rev. Mike Michie, and the Rev. Katie Nakamura Rengers from the Episcopal Church Center, and consultant Mr. Steve Matthews for their collaboration and mutual ministry with us over the past triennium.

Mandate

Resolutions 2018-A005 & 2018-A032

2018-A005 Continue a Church-wide Network for Planting Churches

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

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

Resolved, That the budget for sustaining this church planting network will be $5,800,000.00 for 2019-2021 to be allocated as follows:

$200,000 to identify and support existing programs to produce training in planting congregations for clergy and lay leaders

$600,000 to provide resources for planters of congregations

$1,000,000 for the development and implementation of a program to train bilingual/bi-cultural lay and ordained leaders in church planting for various cultural contexts

$500,000 to support a staff person to oversee the planting network

$3,000,000 for grants to support congregations with the grant depending on the context and need of the congregation; and be it further

$500,000 in matching funds for the support of leadership development programs for the next generation of church planters and ministry developers; and be it further

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

Resolved, That Dioceses receiving money for planting new congregations under this program will contribute significant, resource appropriate, and local funding to support the costs of any new plants; and be it further

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

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

Resolved, That the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of $5,800,000 for the implementation of this resolution.

2018-A032 Congregational Redevelopment

Resolved, the House of Deputies concurring, That the 79th General Convention requests that the Presiding Bishop and the President of the House of Deputies in consultation with the Church Center staff create a church-wide Community of Practice that works with congregations and their bishops to help them redevelop to better engage the cultural realities of their communities for the sake of launching new ministries and multi-cultural missional initiatives; and be it further

Resolved, That the Communications Office be directed to make a priority of reporting on the stories of redeveloped congregations on an ongoing basis through news media, video, and other means and through developing online resources that provid detailed information about the redevelopment efforts happening throughout the church; and be it further

Resolved, That the cost of this initiative will be equally shared by the church-wide budget, participating dioceses and redeveloping congregations; and be it further

Resolved, That the presiding officers appoint a task force to coordinate this initiative in collaboration with Church Center staff. That task force may be combined with a task force on Church Planting and Missional Initiatives at the discretion of the presiding officers; and be it further

Resolved, That the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of $725,000 during the triennium for the implementation of this resolution.

Summary of Work

The Task Force met 20 times over the triennium (as of November 2020), with two of those meetings in person. The global happenings of these particular three years has pushed the whole church, including our Task Force, to embody the agility of the Spirit as the world around us has experienced political and social upheaval, as we have witnessed the rise of nationalism and trends toward isolation, as we have witnessed the unearthing of years of systemic, structural racism, and as we have all experienced the effects of a global pandemic.

We are grateful for the regular discipline of spiritual reflection and community building time at the beginning of each meeting, which helped us to engage our work more richly in the face of broader cultural changes. We truly have felt led by the Holy Spirit as we have navigated the uncharted waters that are church planting, new ministry development, and congregational redevelopment in a tumultuous and changing world.

New Episcopal Communities

Our Task Force's first priority was to continue to build upon the good work completed by the Advisory Group for Church Planting in the 2015-2018 triennium. We found it helpful to clarify what our understanding of New Episcopal Communities (NECs) are:

New: Distinct and different from existing churches and institutions: NECs are not programs of existing churches or dioceses or congregational restarts. NECs have entrepreneurial leadership, a pioneering and creative spirit and seek to bring into being a ministry that was not there before.

Episcopal: Grounded in the faith, doctrine and discipline of the Episcopal church: NECs are clearly, distinctly and overtly Christian in character, approach and identity. They can be churches, mission enterprise zones, or anything in between. While not all will have a worshipping aspect, NECs operate out of and give opportunities to know Jesus' love. NECs are under the oversight of the Bishop and governance of a diocese. They reflect the mission of their diocese and the Episcopal Church.

Community: Designed to be a place of encouragement, care and accountability: NECs commit themselves to love one another in relationships of mutual care and accountability. Patterned after the life and teachings of Jesus, NECs seek to help people grow in faith and life. NECs are committed to long-term growth and sustainability. While not all will be able to become sustainable from the communities they serve, NECs intend to grow in leadership and financial support with proper stewardship, development, facilities and accounting.

With this clear definition, we designed a new ministry planting and granting process for NECs that we believe is more flexible, responsive, and attentive to the call and work of the Spirit blossoming in a particular community and in a way that we can be more supportive at each stage of the new ministry's development. We are grateful for the leadership of staff members from the Episcopal

Church Center, including the Rev. Tom Brackett, the Rev. Mike Michie, and the Rev. Katie Nakamura Rengers, who helped us rethink and redesign this grant process.

Instead of large, upfront block grants, we created and instituted a system designed by the Rev. Mike Michie. Based on his extensive experience in church planting, Michie suggested that progressively larger grants be awarded over time and given in a relationship of ongoing support, mentoring, and connectivity with our grantees. These include:

- **Discernment Grants** of up to $5,000. These one-time grants are for people discerning a call to start a new ministry. Funds can be used for assessment, research and feasibility studies.
- **Seed Grants** of up to $30,000 to begin a new ministry, which assists with start-up costs and initial operating expenses of an experimental new ministry after a discernment period is completed and a ministry plan is developed. No matching funds are needed for these grants.
- **Growth Grants** of up to $30,000 to assist in deeper and fuller development of new ministries as they meet the goals of their ministry plan established in the Discernment and Seed grant phases on their way to sustainability and health. These grants require a significant and appropriate match or other in-kind support provided by the combined contributions of the partner congregation and/or diocese.
- **Harvest Grants** of up to $40,000 to assist ministries with potential for long-term growth in building capacity and in promoting sustainability beyond grants. These grants require a dollar-for-dollar match or other in-kind support provided by the combined contributions of the partner congregation and/or diocese.

As of December 1, 2020, we have considered 103 applications for granting and support of New Episcopal Communities over the triennium. These resulted in our granting:

- 23 Discernment grants, totaling $86,500.00
- 46 Seed grants, totaling $713,551.00
- 23 Growth grants, totaling $455,000.00
- 11 Harvest grants, totaling $280,000.00

(Grants will continue to be distributed past the December 1, 2020 Blue Book reporting deadline.)

Our grantees represent 41 dioceses of the Episcopal Church. Many, if not most, of the New Episcopal communities we supported fulfill the General Convention’s mandate of ministry with under-represented groups, including youth and young adults, differently abled persons, people identifying as members of LGBTQIA communities, people of color, poor and working-class people, people with a high school diploma or less, and/or people with little or no church background or involvement.

Some are at their very moments of origin, discerning how they are called to embody God’s love in their context, while others are in the first few years of existence, developing the leadership teams which will sustain their ministry. We also worked with some new Episcopal communities who began in the last triennium and are now in the position of being able to mentor other burgeoning plants.

To learn more about the New Episcopal Communities we funded, visit:
https://episcopalchurch.org/new-episcopal-communities/who-we-have-funded

In addition to grants, the taskforce supported planters and new ministry developers throughout the Episcopal Church with the goals of:

One, cultivating stronger leaders for the ministry of church planting through improving the ways we identify and develop planters by:

- Developing a pre-assessment workshop for those considering new ministry development, and requiring that assessment as part of the granting process.
- Developing and nurturing a network of coaches experienced in this work, and requiring coaching of our ministries receiving grants.
- Offering one-time online seminars and online drop-in conversations with Church Center planting staff and Task Force members to make the grants process more accessible for those who might be curious, but aren't yet ready to commit to new ministry development.
- Shifting our in-person gatherings from "one-size-fits-all" events to customized training that is focused on particular developmental levels of ministry and cultural contexts.

Two, developing stronger systems of support by nurturing relationships of support for church planters by:

- Improving the way planters interact with their dioceses and bishops for accountability and mutual support. With each grant or renewal, a three-way conversation between the Task Force, a diocesan representative, and the ministry developer is required.
- In partnership with Virginia Theological Seminary, fostering and developing cohorts of ministry developers who meet with each other in colleague groups.
- Connecting with Canons to the Ordinary and other diocesan-level officials to offer mentoring and training on how to supervise, support, and hold ministry developers accountable.
- Developing and writing a New Episcopal Communities What To Expect Guidebook for dioceses, ministry developers, and ministry teams to use.

Three, sharing the story and wisdom of church planting with the wider church by:

- Redeveloping the website of New Episcopal Communities.
- Researching and following-up with grantees from the current and previous triennia for status updates and to glean larger learnings and wisdom.

The effects of COVID-19 on New Episcopal Communities

As the world changed before our eyes with the outbreak of COVID-19, what we have witnessed is that our New Episcopal Communities in the Episcopal Church have much to teach the wider church about being agile as we evolve in, with, and for a world that is very different from the one when our work began in 2018. As a community of people whose vocations have centered on ministry in the wilderness, our ministry developers have particularly modeled for the church how to:

- Understand the "why" of our mission and ministry, discerning the clear reasons God has called us to the particular communities, spaces, and moments we serve.
- Experience failure as an opportunity to learn, restart, and grow.
- Nurture one's own spiritual life so that we can help others to do the same.
- Listen for God's call to pivot, change or adapt ministry on the fly.
- Be limber and unattached from particular spaces, expressions, and patterns of worship.
- Trust members of our communities, listening to their wisdom, celebrating the assets of our communities as gifts of God already present in the world.
- Tell our spiritual stories and invite others to do the same.
- Be curious about our neighbors and what the Holy Spirit is already doing with and in them.
- Take intentional time to rest as a way of renewing oneself for vibrant ministry.

The experience of COVID has highlighted the creativity and adaptive skills of our New Episcopal Communities and their leaders. Though some communities have had to delay aspects of their ministry plan, none have ended due to the challenges of the pandemic. New Episcopal Communities that already had some significant roots in their neighborhoods prior to the outbreak of COVID-19 (typically, in existence for two years or longer), had the advantage of already having a critical mass of committed people who could then worship together online. However, many non-traditional New Episcopal Communities of every age are reporting that their community impact has grown significantly during the last eight months. This may be attributed to the fact that these non-traditional New Episcopal Communities have always relied on smaller, less formal, gatherings and less on a principle Sunday worship service. New Episcopal Communities with an emphasis on neighborhood engagement and multicultural communities are especially thriving.

While the health crisis and economic uncertainty of the summer seemed to put a damper on dioceses discerning a New Episcopal Community (the Task Force received fewer grant applications than usual in July 2020), the energy around this work has picked up significantly. We expect to receive many Discernment and Seed Grant applications in 2021. In addition, the next two Discerning Missional Leadership Retreats (assessments for potential church planters) are already full, which indicates that talented leaders are actively discerning a call to entrepreneurial leadership, and developing visions for what new community may emerge.

Congregational Redevelopment

The Task Force has struggled to respond to the General Convention's mandate to create a church-wide Community of Practice that works with existing congregations and their bishops to help them redevelop to better engage the cultural realities of their communities for the sake of launching new ministries and multi-cultural missional initiatives.

In 2018, we sought the buy-in of bishops and diocesan staff members to help us develop our church-wide community of practice, which we named Missio: Engage!. We envisioned a cohort of churchwide congregations ready for redevelopment, whose leaders, our "Practicing Community", would come together for a year and a half season of spiritual reflection, training, and coached exercises. These participants would be accompanied and led by a team of "Wisdom Community" practitioners, composed of church planters and ministry developers, spiritual directors, community organizers, and leaders of congregations who had already done this sort of work. After speaking with bishops and diocesan staff members, we learned that many felt this was just another renewal program that would not be substantially different from those already offered in the church (e.g. College for Congregational Development, Congregational Development Institute, InviteWelcomeConnect, FaithWorks).

Since we were not gaining significant traction with Missio: Engage!, we decided in 2019 that we would begin with interested individual congregations and congregational leaders instead and work from the grassroots upward. We hired Steve Matthews, a consultant who has experience in congregational redevelopment, to help us connect with prospective congregations who could be a part of our Practicing Community and with individuals who could be part of our Wisdom Community. Under Steve's leadership, we rebranded the Missio offering in late 2019 as Genesis II: Revision and Renew, and we debuted the first of three planned entry points:

- **Tuesdays at 2:00,** a weekly hour-long redevelopment conversation and laboratory for anyone interested in redevelopment where we explore and try on new behaviors for the sake of one another and our neighbors. No long-term investment is required. As of December 1, 2020, approximately 100 people have attended these gatherings from 67 churches, approximately 21 dioceses. As well, 11 diocesan and institutional staff members have attended.

Unfortunately, the timing of our rebrand into Genesis II: Revision and Renew at the end of 2019 coincided with the emergence of COVID-19 in February and March of 2020. The chaos and uncertainty of the COVID pandemic has further limited our ability to connect with congregations ready for redevelopment and substantial re-engagement with their neighborhoods.

The two additional entry points we have planned have not materialized as of December 1, 2020:

- **Coaching Cohorts for Redevelopment** for core teams of 4-5 lay leaders from five congregations who come together twice-monthly on Zoom for 90-minute sessions under the leadership of a coach trained in group coaching and experienced in church leadership. The commitment would be six months.

- **The Practicing Community**, a 15-month initiative engaging a cohort of 12 congregations across The Episcopal Church who are ready to engage in redevelopment for the sake of developing new ministries in their neighborhoods. The Practicing Community would meet online two times a month to learn skills, collaborate as a cohort, and innovate new ways of being church today. The participants would be supported by committed members of a Wisdom Community - mentors, facilitators, and curriculum developers who bring their experience of redevelopment for the sake of new ministries to bi-monthly meetings of participants.

Rather than extending individual grants to congregations, funding allocated by the General Convention for this work has been used to pay our consultant. In September 2020, the Task Force authorized funding for leadership for the coaching cohorts. In spite of the fact that increasing numbers of congregations are signaling their need for redevelopment, it was difficult to gain the focus and momentum necessary to get these cohorts up and running.

Conclusions

Our Task Force was responsible for maturing the good work done in beginning by the Genesis Movement in the previous triennium. Through our work, the Task Force reached the following conclusions about how to further enrich the work of Church Planting and Redevelopment for the sake of new ministry in The Episcopal Church.

The Success of Church Plants Depends on Strong Diocesan Support Networks
Young church plants (and planters) are especially susceptible to being overstretched: pulled by demands of community members, fundraising for their ministry, diocesan expectations, and requirements of previously awarded grants. Being overstretched puts the planter in a vulnerable position. We have learned that we can address this challenge by developing a shared understanding between diocesan leadership (Bishops, Canons to the Ordinary etc.) and the planter with regard to expectations and outcomes of a New Episcopal Community. This shared understanding is created through a covenant, and a conversation facilitated by a third party who has experience with church planting. The conversation is especially important when diocesan leadership has not had the experience of being a church planter.

Discipleship and Worship are Essential Elements of New Episcopal Communities
In this triennium, it became increasingly clear to our Task Force that we want to fund and support New Episcopal Communities that are centered around discipleship and/or worship. This sentiment arose out of a shared belief that the most vibrant New Episcopal Communities are ones who have a deep sense of missional identity which, as followers of Christ, will involve discipleship and/or worship. This is not to say that discipleship and worship have to follow traditional models. In many cases New Episcopal Communities are finding ways of embodying the way of Jesus that are unique to their own context.

Younger Communities Can Teach the Church About Mission Agility
When the COVID-19 pandemic hit the world, churches across our Communion were struck with concerns about maintaining relationships between community members and sustaining a sense of community identity. However, church plants, especially younger communities, reflected to staff and Task Force members that this concern was not as present in their context. We learned that smaller church communities, many in earlier stages of growth, felt less constricted by "business as usual." The Church can learn from the practice of church plants to form leadership teams rooted in deep relationships. Often we think that bigger is better, and perhaps a smaller yet intricately connected community has the capacity to adapt to always changing realities.

There is a Need for Relational/Structural Clarity in the Church Redevelopment Work
The "Redevelopment for the sake of New Ministries" portion of our work lacked a vigor and intention compared to the mandates focused on Church Planting. The work felt amorphous, in a way that made it hard for members of the Task Force to grasp and implement the goals of the work. When "Missio: Engage!" was proposed to Bishops and other diocesan and parish leaders, their responses made it clear that the challenges facing their congregations were not a match with the Missio approach. Daunting complexities face struggling congregations trying to find new ways forward, including releasing the past, dealing with conflict, visioning new ways forward, and trusting their partners in their local community, as well as their diocese.

We hope that the General Convention will continue to provide financial resources and relational connections that are a catalyst for vision for and innovation in the absolutely essential work of congregational redevelopment. Fundamental building blocks must be put in place if the work of congregational redevelopment is to move forward on a churchwide level—beginning with the identification of a key person (or persons) in each diocese who is dedicated to this work and who has a direct line to the Bishop. In this triennium, lack of clarity in the General Convention resolution itself hampered progress in congregational redevelopment on a churchwide level. Clearer goals and expectations, including specificity around how dioceses engage with this work and what congregations need in order to successfully redevelop, are vital for the future success of this work.

Proposed resolutions

A095 Celebrate and Support the Planting of New Episcopal Communities

Resolved, the House of ______ concurring, That the 80th General Convention and the Episcopal Church celebrates and supports the planting of new congregations and ministries, the training and recruiting of planters and mission developers, and the fostering of a church-wide network of support for new ministry development that was originally funded by GC2018-A005 and GC2018-A032; and be it further

Resolved, that the Church continues to prioritize establishing new Episcopal communities that are especially committed to mission and evangelism engaging under-represented groups, including youth and young adults, disabled persons, members of LGBTQIA communities, BIPOC communities, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement; and be it further

Resolved, that the budget for sustaining this new ministry development will be $5,800,000.00 for 2022-2024 to be allocated as follows:

- $200,000 to identify and support existing programs to train clergy and lay leaders in planting congregations
- $600,000 to provide mentorship/coaching/training for planters of congregations
- $1,000,000 for the continuing development and implementation of a program to train bilingual/bi-cultural lay and ordained leaders in church planting for various cultural contexts
- $500,000 to support a church-wide office staff person to oversee the planting network.
- $3,000,000 for grants to new and existing church plants, to be administered by the Task Force for Church Planting in consultation with the Churchwide Office Staff Officer for church planting.
- $500,000 for the support of leadership development programs for the next generation of church planters and ministry developers;

And be it further

Resolved, that the Convention urges The Episcopal Church Development Office establish an advisory group to study the possibility of creating an endowment for church plants; and be it further

Resolved, that Dioceses receiving money for planting new congregations under this program will be required to contribute significant, resource appropriate, and local funding to support the costs of any new plants; and be it further

Resolved, that the bishop or a diocesan advocate representing any diocese receiving funds shall take part in a cohort of church planting dioceses to share best practices and methods of supporting mission developers. Those dioceses not receiving grant funds are also invited to participate in the diocesan cohort; and be it further

Resolved, that this Convention embrace the future of our Church by, after this Triennia, moving the funding for a church-wide office staff-person to oversee the planting network (Staff Officer for Church Planting) into the continuing budget for the Presiding Bishop's staff; and be it further

Resolved, that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of $5,800,000 for the implementation of this resolution.

A096 Develop Sustainable Congregational Revitalization Ministries

Resolved, the House of _______ concurring, That the 80th General Convention and the Episcopal Church celebrates and actively supports the revitalization of congregations, seeking not to restore past glories, but to move into the new callings of our loving, liberating, life-giving God; and be it further

Resolved, that the Church continues to prioritize the revitalization of congregations and a church-wide network of support for congregational revitalization work that was initiated by GC2018-A032; and be it further

Resolved, that in the revitalization of congregations, the Church continues to prioritize commitment to mission and evangelism engaging under-represented groups, including youth and young adults, disabled persons, members of LGBTQIA communities, BIPOC communities, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement; and be it further

Resolved, that the budget for development of sustainable congregational revitalization throughout the Church will be $2,000,000 for 2022-2024 to be allocated as follows:

- $100,000 to engage Bishops and the diocesan representative(s) they appoint in development of a framework for congregational revitalization, identifying roadblocks that regularly thwart this work and identifying resources that are proven to enhance this work;
- $100,000 to engage clergy and lay leaders in gleaning learnings from congregational revitalization that they have successfully done and/or they have failed in attempts to do, identifying roadblocks that have thwarted their work and identifying resources that have enhanced their work;
- $100,000 for translation services and to facilitate participation of Spanish-speaking lay and ordained leaders in training for congregational revitalization;

- $200,000 for further development of five-phase congregational redevelopment strategy - (1) diagnosing/assessing resources and challenges, (2) discerning next calling, (3) connecting with local and diocesan partners, (4) iterating and continued resourcing, and (5) evaluating, refining and sustaining
- $1,000,000 to support a team of local and regional church-wide office staff to oversee the work; and
- $500,000 to provide mentorship/coaching/training for lay and ordained leaders in revitalization of their congregations.

Resolved, that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of $2,000,000 for the implementation of this resolution.

Continuance recommendation

Several important lessons were learned during the last two triennia and inform the following recommendations for future work of this committee or committees with similar missions. **First, we recommend that the work of church planting and church revitalization be separated into two distinct task forces or working groups.** While there are some similarities between these two foci, there are also many differences. Importantly, two separate infrastructures support this work, two separate granting/spending/financial processes are necessary, and two different Episcopal Church Center Staff supervise these distinct areas. While the dual focus of the group has been interesting, it has also been experienced as disjointed. We believe church planting and church revitalization are two of the most important roles of the church at its General Convention. As such, this work is too important, too timely and too far reaching to be given to a single task force or working group.

Regarding church planting, this task force accomplished several important tasks. We continued to support an ongoing network of church planters, coaches, and Task Force members. We developed an updated granting application process, a system for reviewing grants, and made recommendations to Executive Council on behalf of grantees. In general terms, the Task Force had far reaching and influential influence in implementing the terms of the resolution. Regarding church revitalization, however, the committee was tasked with helping implement a resolution that was entirely dependent upon a staff member. While this isn't an issue, per se, it did lead to confusion as to the role of the Task Force itself. **Our second recommendation is that when resolutions are passed to Task Forces, clear instruction is given to the committee as to their role in the implementation of the task force and its mandates.**

Thirdly, we recommend that some current members of the Task Force be seriously considered for future appointments to future task forces or advisory groups. We have experienced a real and positive impact from members of the task force who had previous experience with this work. If it is possible, retaining eligible task force members in the new triennium will help this work continue and continue in a timely fashion.

Our final recommendation is, if it has not already been done, is that **clear guidelines be developed and presented to churchwide groups regarding the work of the development office and how a request can be made of it.** The original text of Resolution 2018-A005 made a request of the development office for the establishment of an endowment specifically in support of church planting. This was not intended to remove church planting from the budget, but rather to support the good work of church planting that does not fit the sometimes stringent demands or particularities of General Convention resolutions. We would still like to study this possibility but are somewhat hindered by the idea that there does not seem to be a clear process whereby a Task Force or a Standing Committee of the General Convention can make requests of an office of the Episcopal Church Staff. We are attentive to the idea that the Office of Development may be charged with many tasks, and we don't want to interfere with any worthy endeavor. At the same time, we also recognize that a Task Force has neither the authority nor the longevity necessary to do the important work of development on its own.

TASK FORCE ON CLERGY FORMATION & CONTINUING EDUCATION

Membership

The Very Rev. M.E. Eccles, *Chair*	Chicago, V	2021
The Rt. Rev. Larry Benfield, *Vice-Chair*	Arkansas, VII	2021
Dr. Scott Bader-Saye	Texas, VII	2021
The Rt. Rev. Diane M. Jardine Bruce	Los Angeles, VIII	2021
Dr. Christopher Corbin	South Dakota, VI	2021
The Rev. Canon Catherine Dempesy-Sims	Western New York, II	2021
Dr. Deirdre Good	Maine, I	2021
The Rev. Dr. Robin Hollis	Arizona, VIII	2021
The Rev. Canon Dr. Lang Lowrey	Atlanta, IV	2021
Dr. Gregory Robbins	Colorado, VI	2021
Mr. Marcellus Smith	Alabama, IV	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rt. Rev. Victor A. Scantlebury died 12/04/2020.

Mandate

2018-D025 Amend Canons III.6.5.g, III.7.5, III.8.5.b, III.9.1, III.10.1.c, III.12.1, III.12.2

Resolved, the House of Deputies concurring, That the 79th General Convention direct the President of the House of Deputies and the Presiding Bishop of The Episcopal Church to appoint a Task Force on Clergy Formation and Continuing Education, including members experienced in theological formation and education, and consisting of a minimum of two (2) bishops, three (3) presbyters or deacons, to include both orders, and five (5) lay persons, who represent the diversity of the Church; and be it further

Resolved, That the Task Force be directed to study the required subjects for the preparation for ordination, including those listed in Canons III.6.5.g and III.8.5.h; and the continuing education of members of the clergy, including Canons III.7.5 and III.9.1; and to study Resolution D025 as originally presented to the 79th General Convention; and to report to the 80th General Convention any proposals for alterations to or consolidation of canons concerning preparation for ordination and continuing education; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of $10,000 for the implementation of this resolution

Summary of Work

The Task Force on Clergy Formation and Continuing Education met four (4) times via Zoom conference on 13 May 2019, 10 November 2020, 1 December 2020, and 17 December 2020.

Once familiarized with the Mandate, the group discovered amongst themselves that the requirements for education and training were widely different based on dioceses. Wanting to get a clear understanding of how the canons concerning preparation for ordination and continuing education are being followed and tracked or recorded, it was decided to create a survey to be sent all Diocesan Bishops.

A sub-committee (Dr. Christopher Corbin, the Very Rev. M.E. Eccles, the Rev. Dr. Deacon Robin Hollis, and Dr. Gregory Robbins) worked on a series of questions to be included in an on-line survey (*see Appendix 1*) created by The General Convention Office.

A portion of the cover letter accompanying the survey read as follows:

> The canons currently require training regarding the prevention of sexual misconduct, civil requirements for reporting and pastoral opportunities for responding to evidence of abuse, the Constitution and Canons of the Episcopal Church (particularly Title IV) and the Church's teaching on racism. Our task force is further directed to consider adding "research-based understandings of gender identity an expression and human sexuality" to the required training.

From conversation among the team, it is clear that each diocese has its own way of living into those canons. For us to successfully do our work, we need to know what those ways are...

With the assistance of Mr. Brian Murry, the survey went live on 17 October 2019, and was closed on 15 November 2019.

Forty-six (46) dioceses responded to the survey which (assuming 111 dioceses received it) is a 41.4% response. The Rev. Dr. Deacon Robin Hollis consolidated the information gleaned from the survey.

In subsequent meetings, the Rev. Dr. Deacon Robin Hollis reviewed the focus of the survey, which included, but was not limited to: Gender Equity/Identity/Fluidity, the lack of training standards across the Church and compliance requirements. He also shared the results of the survey. 2018-D025 was also discussed and it was decided to form two sub-committees; one to do a greater synthesis of the survey (the Rev. Canon Catherine Dempsey-Sims; the Rev. Dr. Deacon Robin Hollis - lead) and a deep dive into 2018-D025 (Dr. Scott Bader-Saye - lead; Mr. Marcellus Smith).

The work of both sub-committees was used to create the following report.

CURRENT WORDING OF CANON III.8.5 IN MANDATE 2018-D025

g. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct.

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

3. the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

4. the Church’s teaching on racism.

D025 proposes inclusion of the following under III.8.5.h (and parallel lists for deacons, bishops, and continuing education

“5. research-based understandings of gender identity and expression and human sexuality.”REPORT AND RECOMMENDATIONS

This committee, based on the mandate “to report to the 80th General Convention any proposals for alterations to or consolidation of canons concerning preparation for ordination and continuing education,” proposes the following alterations.

III.6.5.g

g. Preparation for ordination shall include ~~training regarding~~ *the development of competencies for*

1. ~~prevention of sexual misconduct.~~ *forming communities of racial reconciliation and justice, drawing on the Episcopal Church's teaching on racism.*

2. ~~civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.~~*forming communities that understand and welcome diverse experiences of gender and sexuality, manifest safe and appropriate boundaries, and implement strategies to prevent sexual misconduct.*

3. the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

~~4. the Church’s teaching on racism.~~

III.7.5

The Bishop and Commission shall require and provide for the continuing education of Deacons and keep a record of such education *in the Deacon's personnel file. Continuing education shall consist of a minimum of 30 hours of pedagogically engaged courses of study to support ministry and to enhance the continued personal and vocational growth of the clergy*.

III.8.5.h

h. Preparation for ordination shall include ~~training regarding~~ *demonstrated knowledge o*

~~1. prevention of sexual misconduct~~

~~2.~~ *1.* civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.

~~3.~~ *2.* the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

~~4. the Church's teaching on racism.~~

i. Preparation for ordination shall include the development of competencies for

1. forming communities of racial reconciliation and justice, drawing on the Episcopal Church's teaching on racism.

2. forming communities that understand and welcome diverse experiences of gender and sexuality, manifest safe and appropriate boundaries, and implement strategies to prevent sexual misconduct.

III.9.1

The Bishop and Commission shall require and provide for the continuing education of Priests and keep a record of such education *in the Priest's personnel file. Continuing education shall consist of a minimum of 30 hours of pedagogically engaged courses of study to support ministry and to enhance the continued personal and vocational growth of the clergy.*

III.10.1.c

c. demonstrated knowledge of and competencies for

~~1. prevention of sexual misconduct~~

~~2.~~ *1.* civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.

~~3.~~ *2.* the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

~~4. the Church's teaching on racism.~~

3. forming communities of racial reconciliation and justice, drawing on the Episcopal Church's teaching on racism.

4. forming communities that understand and welcome diverse experiences of gender and sexuality, manifest safe and appropriate boundaries, and implement strategies to prevent sexual misconduct.

III.12.1

No change recommended.

III.12.2

The House of Bishops shall require and provide for the continuing education of Bishops and shall keep a record of such education *in the Bishop's personnel file. Continuing education shall consist of a minimum of 30 hours of pedagogically engaged courses of study to support ministry and to enhance the continued personal and vocational growth of the clergy.*

Explanation

1. Changing "training" to "demonstrated knowledge": Requiring attendance at a training course does not in itself assure that the desired knowledge has been gained. Some trainings are high quality, and some are not. Shifting the language from training to "demonstrated knowledge" names more clearly what is required and makes clear that the knowledge needs to be demonstrated through some means of assessment.

2. Adding III.8.5.i: Some parts of III.8.5.h are primarily knowledge focused (civil requirements, Constitution and Canons) while others imply competency (preventing sexual misconduct and addressing racism). Separating these allows for this distinction to be clear. Adding III.8.5.i gives a place to name and describe competencies needed to form communities that can embody the gospel in relation to issues of race, racism, sex, and gender.

3. Vision of the good: instead of listing "prevention of sexual misconduct" and "teaching on racism," the canons could more clearly point toward the goal of what kind of communities we wish to create. This orients the formation toward achieving a good rather than just avoiding an evil.

4. Inclusion of sexual orientation and gender identity: expanding the "prevention of sexual misconduct" canon to include "understand and welcome diverse experiences of gender and sexuality" makes clear the importance of church leaders understanding the basic concepts and vocabulary related to sexual and gender diversity, as well as the importance of providing places for inclusion and support for those who may have experienced rejection, shaming, and violence.

5. Continuing Education minimum standard: Many professional organizations and certifications (i.e. driver's licenses) require a renewal process. This is to ensure that those certified are aware of and responsive to changes in operating standards, societal changes, and legislative changes. This applies to clergy in order to continue honing skill sets – especially skillsets to adapt to constantly changing societal, spiritual, demographic, and environmental issues/concerns. This can be accomplished by mandating continuing education (CE). The CE points to the competencies of each order.

The global pandemic and racial unrest in 2020 illustrated an unexpected need to begin or increase the use of technology to integrate worship and congregational communication. Many clergy did not possess the knowledge or skills to pivot to meet the needs of their congregations. This situation supports the requirement for a minimum and consistent standard for continuing education.

The ability for clergy to move between calls and dioceses has become more frequent. A minimum and consistent standard for all required training and continuing education means assures a level of knowledge that can be maintained, and common agendas shared. Local requirements can be added to reflect cultural and local understanding as needed.

Analysis of the survey feedback indicated a need to identify a minimum amount of CE for all clergy. Additionally, a better definition and common language as to what constitutes minimum form of CE is necessary. For example, CE must be interactive (i.e., not just reading a book or watching video) focusing on the ability to encourage self-directed learning with accountability through incentives and/or consequence recommendations. Possible incentives might be:

- Bonus and/or honorarium (in part because Deacons are non-stipendiary)
- Scholarship money for further studies or courses
- Gift certificate
- Honor roll of recognition at a diocesan convention

The survey also exposed there are no substantive consequences or minimum standards for not completing the required learning. Potential consequences could be:

- Reprimand in file
- Ineligibility to stand for Diocesan office
- Limitation placed on opportunities to move assignments or cures

6. Need for a minimum consistent standard for a "Human Gender and Sexuality" curriculum: to support minimum requirements, common language and definitions are needed to ensure TEC is addressing the same issues in all dioceses. The ability to use TEC's economies of scale, expertise and programming to create a curriculum which teaches an understanding of human gender and sexuality that goes beyond simply watching a video and printing a certificate is paramount. With this focused

effort, a minimum level of demonstrated knowledge and understanding using common language will allow clergy to share, teach, and preach more effectively. Within TEC, the use of "Sacred Ground" and listening circles are proving effective in deepening and broadening understanding issues of racial injustice and plausible solutions. The use of a similar approach regarding human gender and sexuality (adapted for local use) could be expected to have a similar result.

7. Recommendation for consistent/standard online tracking of training: To ensure compliance and assess the efficacy of required continuing education in today's fast-paced and cross-cultural environment, a technological resource is needed. Again, using TEC's economies of scale, creation of a TEC-level recording/tracking system of competency-based education and a learning record (CLR)* for all clergy is critically important.

* Footnote:[Learning Record] Open Standard Comprehensive Learner Record (CLR). It is an open-source, secular system, reportedly superior to Moodle. CLR defined: The Comprehensive Learner Record (CLR) is the new generation of secure and verifiable learning and employment records supporting all nature of academic and workplace recognition and achievements including courses, competencies and skills and employer-based achievements and milestones.

A potential solution other task forces are currently reviewing include competency-based theological education. One example is Pathways for Baptismal Living, a comprehensive process for discerning and answering the Call. Led in part by Bexley-Seabury Seminary Federation, we understand this suggestion has support from Association for Theological Schools (i.e., new standards and regardless of where the formation comes - seminary, local, 3rd party like IONA, CALL, etc.).

TASK FORCE ON COMMUNION ACROSS DIFFERENCE

Membership

The Rt. Rev. John Bauerschmidt, *Convener*	Tennessee, IV	2021
The Rev. Canon Susan Russell, *Convener*	Los Angeles, VIII	2021
Ms. Megan Allen	Ohio, V	2021
The Rt. Rev. Gregory O. Brewer	Central Florida, IV	2021
Mr. Fred Ellis	Dallas, VII	2021
The Rt. Rev. Thomas Ely	North Dakota, VI	2021
Mr. Miguel Escobar	Long Island, II	2021
The Rev. Scott Garno	Albany, II	2021
The Rt. Rev. Mary Gray-Reeves	North Carolina, IV	2021
Ms. Anna Haeffner	Southwest Florida, IV	2021
The Rev. Canon Jordan Hylden	Dallas, VII	2021
The Rt. Rev. Moises Quezada Mota	Dominican Republic, IX	2021
The Rev. Canon Tanya Wallace	Western Massachusetts, I	2021
Dr. Christopher Wells	Dallas, VII	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

2018-A227 Communion Across Difference

Resolved, That the 79th General Convention direct the Presiding Bishop and the President of the House of Deputies to appoint jointly a Task Force on Communion across Difference, consisting of not more than 14 people, who represent the diversity in this Church including members from countries other than the United States; and be it further

Resolved, That half of the members appointed hold that marriage is a "covenant between a man and a woman" (BCP, 422), half of whom hold that marriage is a "covenant between two people" (Resolution 2018-A085), in the presence of God, and that all of those appointed seek a pathway toward mutual flourishing in The Episcopal Church; and be it further

Resolved, That the Task Force seek a lasting path forward for mutual flourishing consistent with this Church's polity and the 2015 "Communion across Difference" statement of the House of Bishops (https://www.episcopalchurch.org/library/article/mind-house-bishops-statement-'communion-across-difference'), affirming (1) the clear decision of General Convention that Christian marriage is a covenant between two people, of the same sex or of the opposite sex, (2) General Convention's firm commitment to make provision for all couples asking to be married in this Church to have access to authorized liturgies; and also affirming (3) the indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness the Church needs; and be it further

Resolved, That the Task Force consult widely with members of this Church who represent its diversity of cultural background, age, race, gender, gender identity, and sexual orientation, particularly its members in countries other than the United States;, and also with representatives reflecting the diversity of views and voices of the Anglican Communion, our full-communion ecumenical partners, and those churches with whom we carry on ecumenical dialogues; and be it further

Resolved, That the Task Force report and make recommendations to the 80th General Convention, ending its term at that time except by further action of General Convention.

Summary of Work

"Put Out into the Deep Water": Communion across Difference as a Christian Call

Preface

In 2018, General Convention granted churchwide access to authorized marriage liturgies for all couples (Resolution 2018-B012). At the same time, General Convention sought to identify a "lasting path forward for mutual flourishing" upon which both a majority of Episcopalians and a decided minority could walk together despite disagreeing about marriage (Resolution 2018-A227). For the latter purpose, the present task force was appointed, composed equally of those who hold the theological view that Christian marriage is the union of two people regardless of gender, and those who support the view that Christian marriage is only between one man and one woman. As Resolution 2018-A227 made clear, this work would need to be consistent with the Church's polity, consonant with General Convention's clear decision about marriage, and careful to protect the "indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness the Church needs."

At our first and only face-to-face meeting, we articulated the following commitments[1] as part of a working definition for mutual flourishing:

To grow together in mutual love, affection, and trust, recognizing our differences;

To honor the polity of The Episcopal Church and the authority of the General Convention;

To respect the dignity of one another as we engage the challenging work of discernment and transformation, so that all members, faith communities, and dioceses of The Episcopal Church may experience an equal, indispensable, and unqualified place and voice in the shared Body of Christ;

To speak and listen to one another and strive, wherever wounds may exist, to do all in our power to labor together toward reconciliation, walking together in the way of love so that God's reconciling mission may flourish;

To pray without ceasing for one another and for God's grace to guide us more deeply into loving relationships.

In turn, we have sought to understand and describe something of the richness of Christian reconciliation, and our persistent communion with one another, even "across" important differences. This is hard work, and we believe it must continue beyond the current triennium. We are energized both by the dialogue, rooted in our common life in Christ, and by the opportunity to "put out into the deep water" (Luke 5:4), where we can learn together the ways of discipleship for the building of the Church. As Jesus said to Simon Peter: "Do not be afraid; from now on you will be catching people" (Luke 5:10)!

With this hope, we have organized our work under three headings, each of which addresses a very real question:

Call to Communion across Difference: How do reconciliation and communion across difference reveal our common sharing in the life, death, and resurrection of Jesus?

Life Together: Virtues and Practices: Can we commend particular practices of life together that reflect our call "to restore all people to unity with God and each other in Christ" (BCP, 855)?

The Path of Mutual Flourishing: Walking Together: What specific steps can we take along a "lasting path forward for mutual flourishing," given our commitment to protecting an equal place and voice for one another in The Episcopal Church?

1. Call to Communion across Difference

"If then there is any encouragement in Christ, any consolation from love, any koinonia in the Spirit, any compassion and sympathy," St. Paul wrote to the church in Philippi, "make my joy complete: be of the same mind, having the same love, being in full accord and of one mind" (Phil. 2:1-2). The koinonia, or communion, of Christian life together consists in our sharing in Christ, who teaches the way of compassion and sympathy by himself modeling them. We learn to follow this way of Jesus through devotion "to the apostles' teaching and to fellowship (koinonia), to the breaking of bread and to prayer" (Acts 2:42), which together constitute the Church's communion of love. By these means of grace, and in the Christian life of neighbor love that flows from them, the followers of Jesus hope for glory, and are enabled to persevere with joy along the pilgrim way.(2) In every case, God goes before by claiming us, and teaching us to claim one another. This is the mission of the

Church: that God "reconciled us to himself through Christ and has given us the ministry of reconciliation" (2 Cor. 5:18; cf. BCP, p. 855).

Our presiding bishop speaks of reconciliation as "the spiritual practice of seeking loving, liberating and life-giving relationship with God and one another, and striving to heal and transform injustice and brokenness in ourselves, our communities, institutions, and society."[3] We wish, in what follows, to reflect on this very practice of reconciliation, and to apply it to the task with which we have been entrusted, to "seek a lasting path forward for mutual flourishing," recognizing that the path has, in important respects, yet to be found. We, the members of this task force, accept that communion and reconciliation already form the basis of our life together in Christ. We have not yet arrived, however, at a "lasting path" for our common pilgrimage. We do not always find ourselves at the same point along the road. Sometimes we disagree about the path itself, where exactly it may be found, even when we share a sense of common mission along the way.

Seeking deeper communion across difference, we hope to be conformed more fully and deeply to Christ and to one another, doing "nothing from selfish ambition or conceit, but in humility regard[ing] others as better than [our]selves" (Phil. 2:3). In the present context of disagreement about marriage, we have asked how we can "look not to [our] own interests, but to the interests of others" (Phil. 2:4). How, in the words of our working definition for mutual flourishing, can we put our respect for one another's dignity to work, so that all may find in The Episcopal Church an experience of equality and indispensability, and therefore feel both at home and heard ("place and voice")?

It is helpful to recall that communion comes in several forms, all of which are overlapping to one degree or another, even as they also demonstrate our differences and disagreements.[4]

A first, most basic form of communion is baptismal, rooted in profession of the baptismal or Apostle's Creed. To profess the creed, and be made one in Christ in baptism, is to share a common membership in the one Body of Christ across space and time. Here, we may speak of basic Christian orthodoxy, rooted in the apostolic faith of the early and undivided Church.

A second kind of communion is ecumenical, given the reality of distinct denominations or churches within the Body of Christ. Most churches today have little trouble recognizing Christians who belong to other churches as fellow members of the Body of Christ. In most cases, we ourselves did not initiate the divisions between us; we inherited them. And yet very real, often painful disagreements about important matters touching on the Church's faith and order also conspire to keep us apart. At our best, we see one another as a large, though no-doubt divided, extended family in Christ, but we do not yet share all things in common (cf. Acts 2:44). We share the communion of baptism and (usually) a basic, creedal faith, but still seek restoration of the fullness of unity.

A third kind of communion is denominational. Here, Christians of a particular tradition commit to walking together with "the same mind, having the same love, being in full accord," as St. Paul says (Phil. 2:2), which has meant for most churches that faith and order are shared in their entirety. As in The Episcopal Church and other churches of the Anglican Communion, beliefs are spelled out in canons, and common structures are adhered to, including structures of governance and decision-making. Ostensibly, the communion is "full," and more than that, the church is singular and unitary, not differentiated. In most instances of denominational communion, this means that little or no variation is possible, either in terms of belief or practice, unless looser structures permit more local patterns of decision making, or some other suitable accommodation of disagreement is found in the name of tolerance or breadth.

In point of fact, Anglicans, and Episcopalians in particular, have often laid claim to tolerance and breadth, and we historically have learned to put up with a good deal of doctrinal diversity, especially between self-nominated parties and schools. As the long 19th century gave way to considerable tumult in the 20th, Episcopalians and global Anglicans, working side by side, laid claim to—and often led—the burgeoning ecumenical movement, turning erstwhile inter-ecclesial swords into plowshares of hopeful reconciliation. Ripples of interest in this work arose in The Episcopal Church starting in the 1850s and crested in the wake of the devastating Civil War, the horror of which made Christian unity seem urgent. With the gospel at the forefront, leaders like William Augustus Muhlenberg and William Reed Huntington, priests who resisted party affiliation, began to imagine that different, even incompatible perspectives could sometimes complement each other on the way to revealing the whole truth. Huntington's Church Idea (1870) helped inspire the tidal wave of distinct "memorials" that crashed into the General Convention of 1886, submitted by the dioceses of Florida, Indiana, Kentucky, Louisiana, and another signed by roughly one thousand clergy and two thousand lay persons, each calling in its own way for a prioritization of "Christian re-union." The General Convention assembled an Episcopal Committee on Christian Unity on the fly, and on the 13th day of the Convention, the Bishop of Long Island presented a report, part of which now appears among the Historical Documents in the 1979 Book of Common Prayer, including the so-called "Chicago Quadrilateral."[5] Rightly remembered as an orienting text for the ecumenical movement of the next century, the Quadrilateral steadily shaped Anglican ecclesiology as well by proposing principles that could guide a nascent Communion consciousness. Arising from an American context of inter-denominational self-awareness and a pragmatism placed in service of the gospel, Episcopalians seeded the notion that structural differences might be accommodated both between and among Christian denominations.

In the important prologue to the Quadrilateral as published by the General Convention in Chicago, the House of Bishops addressed itself "especially to our fellow-Christians of the different Communions in this land," in order to "solemnly declare" The Episcopal Church's readiness "in the spirit of love and humility to forego all preferences of her own." Rather than seeking "to absorb other Communions" into The Episcopal Church, we would attempt to cooperate with them "on the basis of a common Faith and Order, to discountenance schism, to heal the wounds of the Body of Christ, and to promote the charity which is the chief of Christian graces and the visible manifestation of Christ to the world" (all from BCP, pp. 876-77). Grand language, to be sure, and also inspiring for Anglicans and other Christians the world over to read and contemplate. Coming to the four-part program for which the Quadrilateral is named and best remembered, the final point seemed to stick the landing in an impressive, if underdeveloped fashion. The historic episcopate, a calling card for

Anglicans the world over, might be "locally adapted in the methods of its administration to the varying needs of the nations and peoples called of God into the unity of His Church" (p. 877). Underdevelopment has its benefits, as it enables experimentation, flexibility, and a readiness to learn from others in a spirit of missiological exchange. Ever since the Lambeth Conference made the Quadrilateral its own in 1888 (see BCP, pp. 877-78), Anglicans have continually recurred to its principled ideals to capture something of its potent promise, both ecumenically and with reference to our own life together across difference.

In this perspective, the challenge before the present Task Force is not only not new but also plays to a strength of The Episcopal Church, for which we are renowned. Can we view our present disagreements through the lens of a given communion in Christ, and can we imagine ways of walking together that enact the respect, forbearance, and Christian love to which we have long committed ourselves? Stated in terms of the foregoing kinds of communion: since we share an initiating and transformative communion in Christ and "have left everything to follow" Jesus (Mt. 19:27), can we express this faithfully despite, and even through, our disagreements over marriage? Can we imagine ways of living together, both affectively and structurally, that will accommodate our difference, and permit us still to say that we share a common faith and order as Episcopalians and as Anglicans — while peering, like our forebears, over the horizon to the larger body of Christ? Finally, if our differences seem quite fundamental, as this Task Force believes they are, might we nonetheless find some old or new means of flexibility ("local adaptation") that could permit us to carry on in one church and one Communion? If so, our witness may again be heard as resounding testimony to the love of Christ in a time of great division in our country, our Communion, and our world.

The pages that follow show where our work has led us, in common prayer and discernment. We have taken to heart the most-serious call to unity and to Christian friendship, modeled by Jesus (see John 15:15), who died for us. We want to be together, to remain together, to walk together, when we can, and to guard and protect the path for one another even when we need to take some space or walk at different paces. We have sensed that this is a call from Jesus himself, who is our Way of Love.

We seek, as faithful Episcopalians, mindful of the wider Anglican Communion in which we have been placed, to try to find a way to live together in peace that will be a blessing both to ourselves and to those we are called to serve. God helping us, we seek to "put out into the deep water" because we dare to hope that we also, all together, may be given a great harvest of fish, even to the point that our nets begin to break; even when we are tired, having "worked all night long but caught nothing" (Luke 5:4-6). Lord, we believe. Help our unbelief!

2. Life Together: Virtues and Practices

A. Virtues to Embrace

In the conviction that we have already been called by God and remade as members of Christ's body, we want now to say something more about life in the Church as a God-given school in communion and reconciliation. Are there practices to which we are committed, or that we might take up, that already and prospectively demonstrate our "mutual responsibility and interdependence in the Body of Christ,"[6] that can help us sustain communion across difference in the Episcopal Church and beyond? To ask this question is to start to explore the texture and pattern of Christian life together, described variously in Scripture as a call to peacemaking (Matt. 5:9; Rom. 14:19) and forgiveness (Eph. 4:32), to justice, mercy, and humility (Micah 6:8), and to Spirit-inspired fruitfulness, namely, "love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control" (Gal. 5:22-23; Luke 19:42). That Christians are called to such work suggests both that it needs doing and that we might not otherwise get around to it or find it appealing, if left to our own devices. Differences, disagreements, and difficulties between fallen human beings are to be expected. The way of love, which is God's own faithfulness in Christ, provides "the way out," as a path of endurance and blessing (1 Cor. 10:13 and following).

We start with the virtues that help to sustain Christian communion. Classically, a virtue is a stable quality of character. One is loving, brave, honest, or merciful as a pattern of life. For Christians, virtuous living depends upon Christ as exemplar and means, set within a sacramental pattern and the gift of communal constraint itself. "Increase in us," we pray, "the gifts of faith, hope, and charity; and, that we may obtain what you promise, make us love what you command" (BCP, p. 235).

Love

Above all else, Christians are called and commanded to love God and neighbor, as God loves us (Mark 12:30-31; Eph. 5:2). In fact, love begins from a recognition of union as God's own act, rooted in the Passion of Christ, who loves us "to the end" (John 13:1). Abuse has no place in loving relationship. Under all circumstances, truth must be sought and prized, even when it seems hidden away. Love strives to listen well, to build up and not destroy, to repent and forgive, and to repair bonds of affection when they fray. Love wishes to bear witness rather than defeat or erase, even when it perceives grave error. As it imparts a spirit of sacrifice, love serves as the wellspring and nursery of all other virtue (1 Cor. 13).

Patience and forbearance

"When you come together to eat, wait for one another" (1 Cor. 11:33). By this injunction, St. Paul urges patience with our inevitably frustrating siblings — and patience with ourselves, as we pray for the grace to advance in wisdom and truth, subject to the Spirit of mercy. Tolerating a degree of messiness comes with the territory of Christian life, on the way to renouncing vice and growing in virtue. Forbearance names, from another angle, what putting patience into practice looks like, as a loving accompaniment of those whom we believe to be mistaken or seemingly insufferable, out of reverence for Christ (Matt. 25:31ff.). Patience does not turn a blind eye to falsity, tolerate injustice, or otherwise accommodate sin. Relying on the "full armor of God" (Eph. 6:10-18), patience rests in the confidence of God's power to change hearts and form consciences (John 16:8), without resort to human coercion.

Zeal

Seeking communion across difference does not amount to a laissez-faire attitude about biblical faithfulness, holy living, true doctrine, justice for all, or full inclusion. We on the Task Force are zealous about these matters, and we will not give that up. Fierce conversations should be welcome in the Church, resourced richly by Scripture, the tradition of Christian teaching, and reasoned reflection on the experience of the faithful. Zeal for truth, holiness, and justice can easily turn into intolerant zealotry when not joined with love, patience, and forbearance, but joined with them zeal is a virtue and not a vice. Zeal requires courage, as any struggle for what is true and good will meet many obstacles over the long haul. "Be steadfast, immovable, always excelling in the work of the Lord," urges St. Paul, "because you know that in the Lord your labor is not in vain" (1 Cor. 15:58).

Justice

It is sometimes forgotten that justice is a virtue, not only a state of affairs in which everyone receives their due. Following the example of Jesus, the just Christian truly wants to treat all persons with the utmost fairness, to hear them out, and to see that justice is done in those places where injustice persists. This means that the just person will both be committed to struggles for justice in the Church and our civic communities and be committed to treating everyone in these struggles justly, even when we think others are deeply mistaken. The just person will respect the dignity of every human being, as we pledge in our Baptismal Covenant.[7]

Humility

In our zeal for truth, holiness, and justice, we also need humility to admit when we are wrong, even about important matters. Humility serves the virtue of teachableness, which is the willingness to admit that we have much to learn, and that our minds will change as we listen to others. Humility also inspires repentance and penance. Humility is not thinking less of ourselves, but more like thinking less about ourselves — taking the focus off of our own egos and moving past defensiveness. Humility avoids the arrogant certitude of self-righteousness and is willing to admit "I was wrong. I'm sorry I hurt you. How can I make this right?"

If we are filled with such fruits, we will have no great love for conflict, controversy, and winning victory over those we may consider enemies. We will enter into conflict reluctantly and always on the way to reconciliation and restored communion. The virtuous Christian, formed by love of God and of one's fellow members in Christ, will have the prudence to know what to do and how to do it in the many challenges of life together. Such a person will know the "things that make for peace" (Rom. 14:19) in the midst of conflict and strive to edify the whole body. Without love, and the associated virtues for which we pray to God, every effort we make at communion across difference will fail.

B. Practices to take up

The above Christian virtues are not qualities of character that can be had simply by choosing to have them but instead are formed in us by God's grace through the Church's communal practices. As such, we will now proceed from our overview of the virtues that make for peace to consider four practices of the Church that form us in those virtues. For each practice, we will offer examples of what we mean. No doubt, other examples could be identified, but we provide these to spark the imagination and to encourage members of our church to create more of their own.

1. Common prayer, Scripture, and teaching

"They devoted themselves to the apostles' teaching and fellowship, to the breaking of bread and the prayers" (Acts 2:42). As Anglicans, we must start here, formed as we have been for centuries by a Book of Common Prayer and the Bible. Narratives have the power to connect, encourage, and transform us. We experience this in our sharing of the saving realities of Baptism, Eucharist, and the Daily Office, which are enacted in our common liturgical practice and prayer. Our common life is experienced by many Episcopalians and other Anglicans as powerfully drawing us together through the shared narrative of Holy Scripture. And while our common prayer brings together Episcopalians from a wide array of locations and backgrounds, we are able to recognize in each other a shared commitment to the beliefs and practices that the BCP sets forth, even if we might understand or emphasize some of them differently. This is as it should be. To avoid common prayer because of our differences is to enact division rather than seek unity.

When we encounter Jesus Christ in Holy Scripture, we participate in an alternative reality that would bind us together rather than divide. Sometimes, the stories that people tell about their identity and experience are pitched as rivals to other group narratives, rooted in deep wounds and grievances: think, for instance, of Protestants and Catholics in Northern Ireland or partisan politics in the United States. Yet when we are able to share our stories and tell our truths within the wider biblical story of what God in Christ has done to create and reconcile us as one family, it becomes possible to share our stories in a way that brings us together rather than keeps us apart. To this end, this Task Force encourages the sharing of personal narratives and experiences in the context of common prayer and Holy Scripture, to build up our mutual understanding and cultivate awareness of how Christ brings us together and calls us to the work of reconciliation.

An example of this can be found in the Engagement across Difference initiative in the Diocese of Los Angeles: a three year diocesan-wide commitment to a narrative based process including prayer and the reading of Scripture, focused on understanding, healing, and reparation. Another example is the Communion across Difference Facebook page created by our Task Force, which has over 1,800 members. While this page did encourage many to share stories and seek mutual understanding, the limitations of social media were clear insofar as some conversation threads did not achieve mutual understanding in charity. This speaks to the importance of gathering in person and, again, should inspire us to make prayer, Scripture, and teaching the ordinary norms for our life together.

2. Common service

While it may take many forms, the shared work of Christian service is critical for deepening bonds of communion across difference. As is well known, service forms would-be disciples into fit servants, not least as Christ-like friendships naturally grow from the soil of common mission. The very act of service transforms all who are involved, far beyond the immediate purpose of the project at hand.

One example was the three-way partnership between the dioceses of El Camino Real, Western Tanganyika, and Gloucester from 2008-2015, initiated specifically to engage their significant differences in point of view regarding human sexuality. Representatives from the three dioceses gathered for worship, conversation, and acts of Christian service, all of which nurtured mutual understanding and bonds of affection. Along the way, they learned how much they shared in Christ, even though differences and some degree of distance remained. Today, friendship and conversation continue between them, even though that particular dialogue and its projects were completed.

While not a panacea, Christian service always helps to foster trust, common purpose, and friendship, all of which are essential to Christian communion in its fullness. In our differences, there will be areas of service in which we inevitably diverge; we will not all be able to join Anglicans for Life and the Religious Council for Reproductive Choice at the same time, for instance. This makes those areas in which we do converge all the more important. As we seek to grow into the beloved community Christ calls us to be, the Task Force encourages more forging of relationships and common service across difference, particularly with those we may not see as obvious partners.

3. Cultivating common bonds of affection

Building relationships, especially across difference, is indeed a practice that requires intentionality. We naturally gravitate toward people who look, think, and act like us. But when we take seriously our shared experience of Christian narrative, prayer, and service, we make it a point to seek out genuine relationship with those in the body of Christ with whom we might seem to share little in common. As we have begun to experience on this Task Force, the practice of forming bonds with one another changes us over time. We learn that people with whom we disagree are not simply caricatures, but complex and thoughtful persons about whom we care. Without the cultivation of such connection, we are liable to prefer division to reconciliation, and to focus on what keeps us apart rather than what unites us.

While there are many avenues to building relationship, we encourage participation in guided practices centered in the local context, where people can engage together in sacred truth telling across differences. Early in the course of our work, the present Task Force developed an exercise grounded in our working definition of mutual flourishing. More recently, Presiding Bishop Curry has highlighted resources for racial reconciliation and healing that we commend for any conversation across difference.[8] All of these are included in the Supplemental Materials section of this report. While trust and safety build over time, we believe that there is value in hearing in plain and clear language the "truth" of what each "side" of a conflict or disagreement wants or needs for itself, as well as what it needs or wants from the "other" side. As we have experienced in our conversations as a Task Force, this kind of frank conversation, including honest discussion about how we feel we have been wronged or hurt, is a critical part of the truth telling that is a prerequisite for genuine reconciliation. Our hope is that through speaking our truth to one another we will grow in our common desire for deeper communion and reconciliation.

4. Discerning the common good

Episcopalians and other Anglicans have long had a rich conception of the ecclesial common good. We are not simply individuals who happen to like liturgical worship, but Christians committed to accepting Christ as Savior and serving Christ as King "in the fellowship of His Church," as Archbishop Temple's famous definition of evangelism puts it. We share the Church and communion with the triune God and are continually remade to love God and our neighbors through the effective power of the Incarnation, death, and resurrection of Jesus Christ.

If this is so, then what we are doing when we debate some disputed point is not simply seeking to advance an individual agenda or to further some party position, but always first and foremost discerning the common good of our whole church. We readily admit the difficulty here, since we often do not agree on what that common good amounts to. We must not surrender this call, however, which means that we must learn to make it a habit. In what follows, we will suggest two practices that can form us as persons who genuinely seek the common good of God's Church, rather than simply our own private goods or the good of a partisan sub-set of the whole.

C. Seeking outcomes acceptable to all

In any setting in which decisions are made by vote, majorities and minorities can find themselves locked in pitched battles that end in bitterness and alienation. To be sure, routine matters of business do not present much of a problem in this regard; one hopes that all could live with a decision to shift headquarters from New York to Chicago, notwithstanding preferences one way or the other. Problems emerge, however, when the point at issue carries existential and/or conscientious import for majority and minority alike. Proceeding with an unnuanced decision in such a case may lead to the exit of minority members from the community, both individually and en masse.

The Episcopal Church lacks at present an adequate practice of seeking out and listening to minority voices in a bid to accommodate their concerns. To be sure, exemplary instances may be found, one of which was the conversation leading up to Resolution 2018-B012 at the 79th General Convention. Both before and during the convention, self-described progressives and conservatives on the matter of marriage sought one another out to find a path forward that would be acceptable to all concerned.(9) While we did finally reach such an agreement, the process was frankly painful and bruising for some on both sides, as mistrust, alienation, and perceived disrespect hindered, and nearly derailed, the work at several points. We have started to speak honestly about these hurts on this Task Force and striven to hold one another's perspectives in a sacred trust, to listen non-defensively, and to apologize for the hurt we caused, as we are able.

Some members of our Task Force who participated in these conversations testify that the ground had been prepared, as well, by indaba groups in the House of Bishops, following the lead of the 2008

Lambeth Conference, as a means of seeking consensus through Bible study, prayer, and conversation in lieu of winner-take-all outcomes.[10] We urge the church to normalize this kind of practice in our deliberations, whenever disputed questions are felt to carry an immediate, personal urgency.

While this commendation clearly applies to all our disputes about marriage and sexuality in the last forty years, it stands on its own as a principle worth preserving for other pressing matters as they come along. If we follow the lead of Resolution 2018-A227, the practice of seeking outcomes acceptable to all will typically involve making a clear decision at a churchwide level, while seeking to accommodate minorities for whom the decision carries conscientious and/or existential weight. The nature of those decisions and accommodations will of necessity vary from case to case. The important thing is committing to a practice that will be followed and respected by all, on the way to discerning the common good of the whole rather than simply a part.

D. Discerning together the mystery of God's will

Legislative assemblies like General Convention are, by definition, outcome oriented, as well-crafted resolutions developed in committees, thoughtful debate, and broad coalitions enable leaders to discern, as best they can, the mind of the church at a given time. Local and regional synods have always been thus, set as they are within a wider testing of the faithful (sensus fidelium) over time, on the way to universal agreement. God's mysterious will is difficult to discern. Viewed in this way, we see the importance of flagging local and regional councils as provisional in nature, always awaiting wider reception over time, through which, we trust, wisdom will prevail in the Spirit-inhabited catholic and apostolic Church.

Seminaries, conferences, journal symposia, Bible studies, and many other such common pursuits enable Christians to take counsel about matters of concern. Here the point is less about outcomes than it is formation, fed by careful study, deliberative discernment, and collegial conversation, always set in a context of common prayer. Patience, commitment, humility, and perseverance are all required in this work, which will not be accomplished in a single triennium, nor indeed by one task force, with or without Zoom. Deliberative, non-outcome-oriented discernment, like love, never ends, but rather provides a healthy diet for a fit and properly functioning body (1 Cor. 13:8; cf. 12:12ff.).

A case in point is the recent consultation sponsored by the House of Bishops Ecclesiology Committee and hosted by Virginia Theological Seminary, "When Churches in Communion Disagree."[11] Here, a number of leaders from The Episcopal Church and the wider Anglican Communion, including some members of this Task Force, gathered to "explore strategies for maintaining unity within the Anglican Communion in the midst of deep theological differences."[12] In her paper on "the grammar of communion," Professor Katherine Sonderegger compared our differences over marriage to the disagreement between Franciscans and Molinists, which perdured for hundreds of years before finally achieving recognition as acceptable schools of opinion within one church. Other papers from a variety of perspectives similarly sought to make theological sense of our disagreements and divisions, without immediate recourse to resolutions or political considerations.

Many other examples could be named. On all counts, the key is non-outcome-oriented deliberation across difference about fundamental issues for our common life, fed by a spirit of cooperative inquiry. Such a practice may be especially important for theological and other minorities, as a way for their voices to be heard and understood by majorities. Step by step, waiting for one another, we may confidently expect to be "transformed by the renewing of [our] minds, so that [we] may discern what is the will of God — what is good and acceptable and perfect" (Rom. 12:2).

3. The Path of Mutual Flourishing: Walking Together

For more than 40 years, The Episcopal Church and Anglican Communion have labored to discern wisely and come to agreement regarding matters of human sexuality, sexual orientation and gender identity, the meaning of marriage, and larger questions about how decisions are made and the limits of diversity. In an important sense, none of this is fully settled: disagreements remain, debate continues, and many questions about next steps remain unanswered, even as working answers in both the Episcopal Church and Anglican Communion are in place, writ in terms of majority and minority views. We wish now to focus specifically on The Episcopal Church and try to describe the present reality of "communion across difference" following the last several General Conventions. What progress have we made and what outstanding questions and differences remain?

Here are the principal actions of the last two General Conventions regarding marriage, common prayer, and communion across difference:

- Resolution 2015-A036: Amend Canon 1:18 [Of the Solemnization of Holy Matrimony][13]
- Resolution 2015-A054: Authorize Trial Use of Marriage and Blessing Rites in "Liturgical Resources I"[14]
- The 2018 Blue Book Report from the Task Force on the Study of Marriage, including Canon Jordan Hylden's appended minority report[15]
- Resolution 2018-B012: Marriage Rites for the Whole Church, including matters referred to the Standing Commission on Liturgy and Music (SCLM) from Resolution 2018-A085, submitted by the Task Force on the Study of Marriage[16]
- Resolution 2018-A227: Task Force on Communion Across Difference[17]
- Resolution 2018-A068: Create a Task Force on Liturgical and Prayer Book Revision[18]

We find here a noteworthy both/and pattern. In 2015, the General Convention both enacted a change to the marriage canon and accepted the trial use of new marriage liturgies for all couples and rites for blessing of same-sex relationships; and provided that such trial use be under the direction and with the permission of the bishop exercising ecclesiastical authority and welcomed the minority voice of the Communion Partners as indispensable.[19] Similarly, the 2018 General Convention both authorized additional trial use marriage rites for all couples and blessing rites for same-sex couples in dioceses where civil marriage is not legal; and underscored the canonical authority of rectors or priests-in-charge over worship in their congregations and the ecclesiastical authority of bishops acting as chief liturgical officers in their dioceses, including those who cannot support marriage for same-sex couples on theological grounds. In concert with this, 2018-B012 called for bishops to continue leading the church in comprehensive engagement with the trial use rites and to provide generous pastoral response to meet the needs of all members. Finally, while the work of ongoing liturgical revision was authorized, the 1979 Book of Common Prayer was memorialized, ensuring its continued use.

Springing from this context of compromise, our Task Force was charged not with trying to resolve the fundamental differences between us but with seeking to accommodate them as a necessary gift. To quote our authorizing resolution (2018-A227): given "the clear decision of General Convention that Christian marriage is a covenant open to two people of the same sex or of the opposite sex" and "General Convention's firm commitment to make provision for all couples asking to be married in this Church to have access to authorized liturgies," The Episcopal Church also affirms "the indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness our Church needs." Holding all three points together, Resolution 2018-A227 charged our Task Force to "seek a lasting path forward for mutual flourishing" for the two sides or perspectives — the majority and the minority — on marriage, and it provided a heading for the work: "communion across difference."

The commitments embedded in our own Task Force's working definition of mutual flourishing, referenced earlier, center on spiritual aspects of our life and labor as Episcopalians, including the commitment to honoring the polity and authority of our church. Strengthened by God's grace and our own resolve, we are able to grow together in love and trust, to serve side by side in The Episcopal Church, respect, listen to, and pray for one another. All of these commitments ground and orient the work of building and sustaining communion across difference and we have reflected on them in the first two sections of this report. We confess that we have not always done this well over the years and acknowledge the many ways that people on all sides of our various differences have hurt one another along the way. With a legacy of lawsuits, mutual recrimination, church division, and crisis in the Anglican Communion on our watch, reparations and reconciliation still seem to us a way off. At the same time, we are grateful for many good-faith attempts at mutual listening and learning that we pray are seeding a new spirit in our church, turned outward in hopeful conversion and restoration — truly, a Way of Love.[(20)]

More pointedly, the second and third commitments in our working definition of mutual flourishing touch on the concrete challenge at hand, if all are to flourish in the communion of one church. How can the members, communities, and dioceses of the majority and minority experience an equal, indispensable, and unqualified place and voice within the given structures of The Episcopal Church? This is a critically important question. The present report will not and cannot provide a definitive answer, although we are grateful to offer our own perspectives and suggest some ways forward. We urge the whole church to commit itself to careful listening, study, and prayer, so that we may be equipped for the continuing work that lies ahead.

We believe that the establishment of this Task Force represents a kairos moment, given providentially by God at this time to help Episcopalians and Anglicans find a path forward together. The circumstances leading up to the passage of Resolution 2018-B012 (Marriage Rites for the Whole Church) by the 2018 General Convention, and its subsequent authorizing of this Task Force, marked a hard-won compromise that many did not imagine possible. Significant bridge-building work on the part of the proposers of 2018-B012, the Communion Partners, including those from Province IX, members of the Task Force on the Study of Marriage, the Presiding Bishop's staff, Legislative Committee 13, and countless other bishops and deputies enabled all voices to be heard and listened to, in as full a way as possible. At the conclusion of the 79th General Convention a variety of voices welcomed the widely touted compromises and looked to the present Task Force for next steps.[21]

If the work of the last two General Conventions set an important precedent of cooperation between majority and minority in The Episcopal Church, it also bequeathed to the present Task Force on Communion across Difference signposts toward a lasting path forward for mutual flourishing. The General Convention has demonstrated that diversity and difference, incorporating real disagreement about important matters, need not necessitate division, if a spirit of compromise is cultivated to protect the place and voice of all.

What are some further steps that The Episcopal Church might take in order to sustain difference-in-communion on the way to the flourishing of all? As before, we pose questions that provide openings for carrying forward this work, both in the present triennium and thereafter, organized around the threefold typology of communion — baptismal, denominational, ecumenical — that we introduced in section one.

Solidarity of love: Baptismal bonds

Jesus Christ called his disciples friends (John 15:15), and in his body, the Church, all who are baptized in his name are re-made as his members (Col. 1:18; Rom. 6:3-14). Each member is indispensable, including those who seem to be "weaker" or "less honorable" — whom, St. Paul says, we are called "to clothe with greater honor." For "God has so arranged the body, giving the greater honor to the inferior member, that there may be no dissension within the body, but the members may have the same care for one another. If one member suffers, all suffer together with it; if one member is honored, all rejoice together with it" (1 Cor. 12:22-26).

These scriptural descriptions of the whole Church apply to all denominations that seek faithful conformity to the pattern of life in Christ. Can we in The Episcopal Church and Anglican Communion decide to disagree without causing dissension? Can we guard our differences without yielding to division? As is perfectly clear from our own recent struggles and from the history of the Church, this is not easy. It is not, however, impossible. If and as we are able to commit to walking together, however duly differentiated or distanced, we will be claiming our call as brothers, sisters, and siblings whom Jesus befriended and invited to join him on the way of love and loyalty "to the end" (John 13:1).

Presuming place and voice for both the majority and minority on marriage, can we commit ourselves to continual, careful listening as a demonstration of Christ-like solidarity, "always carrying in the body" the stories and experiences of one another (2 Cor. 4:10) as the precious gifts they are? Can we agree "not to neglect meeting together, as is the habit of some, but encourage one another" (Heb. 10:25), especially in person, because we profess the incarnation and resurrection of Jesus, and pray to be "become like him in his death, if somehow [we] may attain the resurrection from the dead" (Phil. 3:10-11)? And can we cultivate communion with Anglicans the world over, and with the wider body of Christ, on the way to sharing, by degrees when necessary, "the apostles' teaching and fellowship, … the breaking of bread and the prayers" (Acts 2:42)? All of this and more follows from our having been claimed by Christ in baptism, which sacrament is the principal building block for all forms of communion, as the beginning of the journey of discipleship in the body.

Communion across Difference: Episcopal precedents

If baptismal solidarity orients our life together as Christians in The Episcopal Church, our commitment to protecting both place and voice in the same church for the majority and minority on marriage presents a specific opportunity to practice communion across difference. As described above, our church has struggled to hold together both clear decisions reached by legislative majorities and to safeguard space for minorities who in good conscience cannot agree but wish loyally to remain both in the Episcopal Church and the Anglican Communion. This was true in the early years of the struggle for the full inclusion of LGBTQ members and it is true today for the Communion Partners. Given our recent history, the suggestion of accommodating minority views in perpetuity may seem strange. However, Episcopalians have long cherished ideals of openness and flexibility and are known among Christians for welcoming diversity.

In the first section of this report, we recalled the 1886 General Convention's influential offering of a locally adapted episcopate to Christians of other jurisdictions, which has borne considerable ecumenical fruit.[22] Might the achieved compromise of the 79th General Convention signal the start of a new era in our church's history, as a time when we began giving the gift of the Chicago Quadrilateral to ourselves to enable all to flourish? Locally adapted disagreement with respect to marriage might take various forms, ranging from simply deciding to accept diversity, as we have done recently in The Episcopal Church, to more ambitious structural reforms, of a sort that others in the Anglican Communion are attempting. There may be good reasons for both at different times, and some degree of flexibility can aid experimentation on the way to wise and peaceable settlements.[23] We will come to several examples in the Anglican Communion in the next sub-section. For now, it bears repeating that the 2018 General Convention accepted diversity between dioceses by enabling flexibility in the oversight of parishes. Built upon the precedent of DEPO, this solution reflected, in the words of 2018-B012, our continued commitment "to honor theological diversity in regard to matters of human sexuality" (2018-B012 §13).

Here we register some of our own questions about the limits of diversity, and the sustainability of the peace that General Convention brokered in 2018. Given that we seek to be comprehensive, is it nonetheless a bridge too far to adapt ourselves to two doctrines of marriage (or of anything else) within one church (recognizing, for instance, canonical discrepancies between diocesan and churchwide definitions of marriage)? Moreover, is differentiated oversight of some parishes from their geographic dioceses — both “majority”-identified parishes within “minority” (Communion Partner) dioceses, and vice versa — sustainable in the long, or even medium term? On both sides, clerical leaders as well as members of those parishes sometimes feel out of sorts with their dioceses, disrespected by colleagues, and alienated from their bishops. As members of our Task Force testified, such feelings have been common among both self-identified LGBTQ and conservative clergy, laity, parishes, and dioceses for at least a generation. Add to this questions about succession of leadership for all concerned — “majority”-minded clergy in “minority”-identified dioceses on the one hand; Communion Partner dioceses themselves, and “minority”-identified clergy and parishes elsewhere, on the other; and finally the wider ecclesiological question of what it means for the minority in this instance to hold the majority view of the Anglican Communion. Some say that 2018-B012’s “supplemental episcopal pastoral care” has worked well, just as the older delegated episcopal pastoral oversight (DEPO) still serves its purpose for parishes in various dioceses on both sides. Even so, one, uniform policy to accommodate all arrangements of adapted episcopal care seems requisite, if heretofore ad hoc arrangements are to find their feet as settled means of negotiating communion across difference.

On all counts, more work should be done to understand and receive the compromise of the 79th General Convention, as a step toward sustaining difference-in-communion for the flourishing of all. We recognize that other church-wide groups such as the Task Force on Women, Truth and Reconciliation, the Executive Council Committee on Anti-racism and Reconciliation, as well as the SCLM and Task Force on Liturgical and Prayer Book Revision are laboring in this and adjoining fields. We believe that attention should be given to the ecclesiological questions raised in the present report, especially to do with the exercise, role, and range of episcopal ministry, since the ministry of bishops necessarily incorporates local, regional, and worldwide aspects. In a world that seeks to overcome disagreement through enforced uniformities, differentiated communion in an episcopal key may contribute a much-needed leaven of principled diversity, set within provisional structures that model humility.[24]

Walking together at a distance: Ecumenical connections

We noted above that locally adapted disagreement may take various forms, and we wish finally to touch on several other models, drawn from colleagues in the Anglican Communion, with whom we were charged to consult (2018-A227 §4). If these models tend toward more structural solutions to the challenge of communion across difference, they also share a commitment to finding ways of walking together in order to enable mutual flourishing, typically with recourse to concepts developed in ecumenical settings.

Walking together entered the contemporary lexicon of the Anglican Communion with the well-known conclusion of The Windsor Report (2004), which warned: “There remains a very real danger that we will not choose to walk together. Should the call to … find ways of continuing in our present communion not be heeded, then we shall have to begin to learn to walk apart" (§157). Less-often remembered is the same text's earlier reference to walking together, which excavated the literal Greek meaning of the phrase: synodality. As the report summarized: "It is by listening to, and interacting with, voices from as many different parts of the family as possible that the Church discovers what its unity and communion really mean" (§66). The image of walking together returned at the historic 2016 Primates' Meeting, Archbishop Welby's first, which all the primates attended, including Presiding Bishop Curry. At meeting's end, all professed a "unanimous desire to walk together," even when some "distance" may seem necessary on the way to persevering in love.[25]

The 2018 General Synod of the Anglican Church in Aotearoa, New Zealand, and Polynesia provides a second example of walking together at a distance on the way to resolving neuralgic conflict. In a first step, the motion on marriage accepted by synod retained the traditional formularies while allowing bishops to permit the blessing of same-sex unions within their dioceses. In turn, however, the non-geographic Diocese of Polynesia, culturally distinct from the other two ethnic groupings in that province's "three-tikanga system," chose to opt out of the motion's provision for same-sex unions as not in keeping with its theological and cultural understanding of marriage. While the Anglican Church in Aotearoa, New Zealand, and Polynesia is uniquely structured in a way that can accommodate the latter decision, the Indigenous minority in the Anglican Church of Canada is now pursuing a similar structural differentiation from its province as a whole. Such developments can be painful, to be sure. At the same time, as Secretary General Josiah Idowu-Fearon noted about the resolution in Aotearoa, New Zealand, and Polynesia, it "recognized that difference without division is possible" — difference, in this case, incorporating a non-geographical diocese within the wider church.[26]

A third instance of differentiated walking together may be seen in the Church of England's "Five Guiding Principles" with respect to women's ordination, according to which a traditionalist "society" was created within the wider church to accommodate the minority, with force of canon and without limit of time.[27] Our own Resolutions 2018-B012 and 2018-A227 resemble these principles, which in the Church of England's case begin by marking the "clear decision" of the church about women's ordination before proceeding to enable the "mutual flourishing" of majority and minority moving forward. The Church of England's Faith and Order Commission, in a significant study, called the settlement "a remarkable adventure in how ecclesial communion can be sustained without agreement in belief and practice on something that has been considered to be of decisive importance for 'full' communion."[28] As in New Zealand, not all have been pleased with this outcome. The new-fashioned space of structural differentiation has, however, arguably enabled the Church of England to avoid schism, through a creative application of ecumenical lessons to its internal denominational life.

All three examples of walking together at a distance may help us imagine next steps along a "lasting path forward for mutual flourishing" in The Episcopal Church, both together and as differentiated dioceses. We said above that seeking a lasting path forward suggests the path has yet to be fully found, but we differ also on the nature of the path itself, to do with how decisions should be made about marriage. In studying this very question, the Ecclesiology Committee of the House of Bishops recently pointed up two views — a majority view that believes the General Convention capable of deciding the matter, and a minority one that believes Anglican consensus is required.[29] Here again, ecumenical ecclesiology, as a school in charity, can help relieve the felt need of being in identical places along the road, even as we remain committed to discovering the pilgrim way of discipleship and of love.[30] A commitment to mutual flourishing for all Episcopalians — and for all Anglicans, and all churches with which we share varying degrees of communion — must likewise commit itself, as we on this Task Force have done, to finding and defending place and voice for all with whom we are walking. There should be no question of walking in lock step, but only a shared hope that, Lord willing, we may continue to advance together toward Christ, and in that Way find one another as well.

Conclusion

The assignment to reflect on communion across difference suggested for this Task Force a focus on how we remain bound together in Christ and in the Church notwithstanding — even, perhaps, aided by — deep disagreement. The directional metaphor “across” brings to mind a bridge, that may be traversed when traveling from one side or part of the Church to another. Each side of the bridge, each part of the Church, has a divine purpose, and so should be respected and protected, just as the bridge enables and invites communication and sharing, by God’s grace. Stated in terms of our presenting challenge, we resolutely accept General Convention’s clear decision about marriage, its firm commitment to providing for all couples seeking to be married, and its affirmation of the indispensable place of the minority, whose witness the Church needs (2018-A227).

While the recent actions of the General Convention are clear enough, we on this Task Force, representing the majority and minority of The Episcopal Church on the subject of marriage, do not know exactly what should come next and what may be possible. We have made a theological argument for communion across difference, raised questions for continuing work, and suggested several adaptive models that may prove useful for our purposes going forward. We wish to live together peaceably in the same church without agreeing on marriage because adding to division in the body of Christ would be a failure both of witness and love. All Christians and churches are struggling with the same questions about sexuality and marriage, and the road is littered with failed attempts at listening, forbearance, transparency, and charity. We accept responsibility for some of this. At the same time, we rejoice that we have been placed together, and within a worldwide communion of Anglicans, that, by God’s providence, is called to solidarity in the Body of Christ.

May God give us the grace to uncover and defend a proper diversity and breadth in the Body, that will encourage many to persevere with joy in the work of communion across difference, “so that the world may believe” (John 17:21).

Postscript

Due to the Covid-19 pandemic, the Task Force met only once in person and seven times using Zoom technology. These challenges hampered our efforts, given the relational focus of conversations about communion. Even so, we have pressed on with courage, and rejoice in the friendships that have grown "across distance." We are proud of the work we have accomplished and commend it to The Episcopal Church and to our colleagues in the Communion, with genuine faith, hope, and love.

End Notes

(1) Adopted by the Task Force on Communion Across Difference, St. Louis, March 19-21, 2019.

(2) See "General Thanksgiving," BCP, p. 101.

(3) Presiding Bishop Curry speaking on racial reconciliation, available online: https://episcopalchurch.org/racial-reconciliation

(4) For three classic texts in the development of what we today call communion ecclesiology, see the Chicago-Lambeth Quadrilateral (1886, 1888); World Council of Churches, Baptism, Eucharist and Ministry (1982); Anglican-Roman Catholic International Commission, Church as Communion (1990).

(5) BCP, pp. 876-77. Since the report was written as a "solemn declaration" of "bishops assembled in council," the House of Deputies needed only to respond, which it did with its own resolution on the 18th day, to wit: "The House of Bishops concurring, that a Commission consisting of five Bishops, five Clerical and five Lay Deputies, be appointed to open communications with the various Bodies of Christians in this land, with a view to ascertaining, from a duly authorized representation of said Bodies, if a disposition exist among them to promote organic unity upon the basis of 'The Apostles' Doctrine and Fellowship and in the Breaking of the Bread and the Prayers;' and further, in the event this disposition does exist, to inquire what benefits they think we can mutually impart to one another, and what advantages in their opinion would result in furtherance of the evangelization of the world; and that this Commission be requested to make a report of its action to the General Convention of 1889." The next day, the House of Bishops concurred with several amendments. See Journal of the Proceedings of the Bishops, Clergy, and Laity of the Protestant Episcopal Church in the United States of America, Assembled in a General Convention, Held in the City of Chicago, from October 6 to October 28, Inclusive, in the Year of Our Lord 1886 (1887), pp. ix, 10, 16, 21, 35, 40, 79-80, 135, 138, 145, 146, and Appendix XXII, pp. 840-44; available online: https://www.episcopalarchives.org/governance-documents/journals-of-gc

(6) Toronto Anglican Congress (1963), available online: http://anglicanhistory.org/canada/toronto_mutual1963.htmlCf. the consequent "Special Program" of General Convention 1967 and the "Venture in Mission" of General Convention 1976.

(7) See further the work of Dr. Donna Hicks on conflict resolution and the essential elements of dignity in the Supplemental Materials section of this report.

(8) Included with his sermon preached at the House of Bishops virtual meeting on September 16, 2020 entitled "What Did Jesus Do?"; available online: https://episcopalchurch.org/posts/publicaffairs/presiding-bishop-currys-word-church-what-did-jesus-do

(9) A press release from the Diocese of Long Island accompanying the filing of B012 recounted the pre-Convention conversations: "The minority of 'Communion Partner' bishops in our church have felt unable as a matter of conscience to permit congregations under their care to practice same-sex marriage, for theological and ecclesiological reasons. They have told us that [the proposed solution of alternative oversight] allows them to maintain their conscientious position, and Communion Partner clergy have told us that it is important for there to be at least some dioceses in The Episcopal Church that both teach and practice marriage alongside the majority of the Anglican Communion. This proposal allows conservatives to flourish within the structures of The Episcopal Church, but not at the expense of progressive congregations in conservative dioceses. While at first glance it may sound unnecessarily complex, it is a 'middle way' that makes room for all in one church." The Communion Partner bishops, in turn, "pledged in writing to implement [B012] in their dioceses, if it is passed." Documents available online: https://www.dioceseli.org/media/diocesan-news/marriageforthewholechurch/ and: https://communionpartners.org/the-vocation-of-anglican-communion/#_ftnref5

(10) Resources on Continuing Indaba may be found on the Anglican Communion's website: https://www.anglicancommunion.org/mission/reconciliation/continuing-indaba.aspx

(11) Jan. 13-14, 2020. Additional sponsors of this event were the dioceses of Texas and Dallas, and the Living Church Institute. Papers are in process of publication.

(12) Mark Michael, "Seeking Communion in the Midst of Disagreement," available online: https://livingchurch.org/2020/01/20/seeking-communion-in-the-midst-of-disagreement/

(13) https://episcopalarchives.org/cgi-bin/acts/acts_resolution-complete.pl?resolution=2015-A036

(14) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2015-A054

(15) https://extranet.generalconvention.org/staff/files/download/21189

(16) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2018-B012

(17) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2018-A227

(18) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution-complete.pl?resolution=2018-A068

(19) From the Communion Partners Website: https://communionpartners.org/about-communion-partners/

(20) "The Way of Love: Practices for a Jesus-Centered Life," available online: https://episcopalchurch.org/way-of-love

(21) Episcopal News Service, "Convention lets its 'yes' be 'yes,' agreeing to give church full access to trial-use marriage rites," July 13, 2018, available online: https://www.episcopalnewsservice.org/2018/07/13/convention-lets-its-yes-be-yes-agreeing-to-give-church-full-access-to-trial-use-marriage-rites/ Communion Partners, "Austin Statement," July 13, 2018, available online: https://communionpartners.org/austin-statement-july-13-2018/ The Rev. Susan Russell, "Episcopal Church Says 'We Do' to Marriage Rites for the Whole Church," available online: https://inchatatime.blogspot.com/2018/07/episcopal-church-says-we-do-to-marriage.html

(22) See especially the multilateral landmark Baptism, Eucharist and Ministry (1982), which embraced a broadened episcopé, retrieved from the New Testament, as a way of imagining a larger pattern of oversight than that simply associated with "bishops" in the traditional sense; available online: https://www.oikoumene.org/en/resources/documents/commissions/faith-and-order/i-unity-the-church-and-its-mission/baptism-eucharist-and-ministry-faith-and-order-paper-no-111-the-lima-text

(23) Cf. the 2009 statement of the Evangelical Lutheran Church in America (with which The Episcopal Church is in full communion), Human Sexuality: Gift and Trust; available online: https://download.elca.org/ELCA Resource Repository/SexualitySS.pdf The ELCA recognized four positions of "bound conscience" on same-sex sexuality within their church. Rather than adjudicating between them, the ELCA called for "mutual respect in relationships" and for life together in disagreement, by which they would "accompany one another in study, prayer, discernment, pastoral care, and mutual respect." Since the ELCA lacks a prayer book that functions as a doctrinal standard, they simply published supplemental liturgies that are now used for same-sex marriages without modification to their standard books of worship.

(24) For the suggestion that The Episcopal Church accepts a principled diversity with respect to marriage and sexuality, see the Anglican-Roman Catholic Theological Consultation in the U.S.A., Ecclesiology and Moral Discernment: Seeking a Unified Moral Witness (2014), §64; cf. §§51, 56. Available online: https://iarccum.org/archive/USA/ARC-USA-2014.pdf

(25) Primates' Meeting communiqué, "Walking Together in the Service of God in the World" (Jan. 15, 2016); available online: https://www.anglicannews.org/features/2016/01/communique-from-the-primates-meeting-2016.aspxCf. Gavin Drake, "Presiding Bishop Michael Curry speaks on Primates' statement," ACNS (Feb. 15, 2016).

(26) Anglican Communion News Service, "Anglican Church in New Zealand opens the door to blessing same-sex relationships," available online: https://www.anglicannews.org/news/2018/05/anglican-church-in-new-zealand-opens-the-door-to-blessing-same-sex-relationships.aspx

(27) Church of England The Five Guiding Principles, available online: https://www.churchofengland.org/sites/default/files/2018-02/5 Guiding Principles.pdf

(28) General Synod, Communion and Disagreement: A Report from the Faith and Order Commission (2016), §68; available online: https://www.churchofengland.org/sites/default/files/2017-10/communion_and_disagreement_faoc_report_gs_misc_1139.pdf

(29) Ecclesiology Committee of the House of Bishops, Re-membering and Re-Imagining: Essays on the Episcopal Church, published as an issue of Sewanee Theological Review, 61/2 (2018); available online: https://www.episcopalchurch.org/wp-content/uploads/sites/2/2021/02/str_ecclesiology_report_2018.pdf The recent consultation at Virginia Theological Seminary, "When Churches in Communion Disagree," Jan. 13-14, 2020, carried this work forward. See commentary from Jean Cotting, available online: https://www.vts.edu/anglican-commentary-detail?pk=1306135

(30) See, for instance, the argument for ecumenical synodality by the Anglican-Roman Catholic International Commission in its latest text, appropriately titled Walking Together on the Way: Learning to be the Church—Local, Regional, Universal (2018). Cf. Communion Partners, "The Way of Anglican Communion" (2018), available online: https://communionpartners.org/the-way-of-anglican-communion-walking-together-before-god/

Proposed resolutions

A056 Communion Across Difference

Resolved, the House of ____ concurring, That the 80th General Convention directs the Presiding Bishop and President of the House of Deputies to appoint a second Task Force on Communion Across Difference to continue the work started but limited by the COVID-19 pandemic, consisting of not more than 12 people, who represent the cultural, generational, racial, ethnic and theological diversity in the Church, including especially members from dioceses outside the United States; and be it further

Resolved, That half of the members appointed hold that marriage is a "covenant between a man and a woman" (BCP, 422), half hold that marriage is a "covenant between two people" in the presence of God (Resolution 2018-A085), and that all of those appointed seek a pathway toward mutual flourishing in The Episcopal Church; and be it further

Resolved, That the Task Force will seek to build on the Blue Book report of the previous triennium, continuing to seek a lasting path forward for mutual flourishing consistent with this Church's polity and the 2015 "Communion across Difference" statement of the House of Bishops, affirming (1) the clear decision of General Convention that Christian marriage is a covenant open to two people of the same sex or of the opposite sex, (2) General Convention's firm commitment to make provision for all couples asking to be married in this Church to have access to authorized liturgies; and also affirming (3) the indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness our Church needs; and be it further

Resolved, That the Task Force develop and publicize further tools for engaging the members of this Church in the substance of the Task Force on Communion Across Difference Blue Book Report to this Convention, including but not limited to videos documenting experiences across this Church that demonstrate positive examples of communion across difference, and materials that broaden the conversation beyond matters of human sexuality and marriage; and be it further

Resolved, That the Task Force consult widely with members of this Church who represent its diversity of cultural background, age, race, gender, gender identity, and sexual orientation, particularly its members in countries other than the United States; and also with representatives from the Anglican Communion, our full-communion ecumenical partners, and those churches with whom we carry on ecumenical dialogues; and be it further

Resolved, That the 80th General Convention commends to dioceses, parishes, and churchwide staff the Conversation Tool created by the Task Force on Communion Across Difference included in the Supplemental Materials section of their Blue Book report to this Convention; and be it further

Resolved, That the Task Force report and make recommendations to the 81th General Convention, ending its term at that time except by further action of General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $75,000 for the implementation of this resolution.

EXPLANATION

The 79th General Convention directed the Presiding Bishop and the President of the House of Deputies to appoint jointly a Task Force on Communion across Difference, consisting of not more than 14 people, who represented the diversity in this Church including members from countries other than the United States, half of whom held that marriage is a "covenant between a man and a woman" (BCP, 422), half of whom held that marriage is a "covenant between two people" (Resolution 2018-A085), in the presence of God, and all of whom sought a pathway toward mutual flourishing in The Episcopal Church. Our Task Force reported and made recommendations to the 80th General Convention, and our enabling resolution specified that our Task Force would continue only at the request of the next General Convention.

The Task Force did its best despite the limitations imposed by the Covid-19 epidemic to accomplish this work, the fruit of which is contained in its Blue Book Report to this Convention. Of particular note is the working definition of "mutual flourishing" developed by the Task Force and a "conversation tool" to assist members of this Church in engaging that definition and the conversation more broadly. The Task Force also articulated a helpful theological framework for engaging communion across difference, recognizing the many challenges and tensions present in that work. While we believe we have done significant theological and relational work on what it means to walk together as disciples of Jesus on the Way of Love, we have only begun a process that cries out for further exploration. We believe that reconciliation and "mutual flourishing" should continue to be our goal, by God's grace, but that the truth-telling, transformation, and relationship building that are necessary on the way to that goal do not come quickly or easily.

Members of the current Task Force believe that building the kind of relationships needed to take this work further were severely hampered by the Covid-19 pandemic and our inability to meet face to face. We propose that to do this work well, funding for at least two face-to-face gatherings over the next triennium will be necessary, and ideally three. Our suggestion to appoint not more than 12 members is meant to make multiple face-to-face meetings financially possible, but a larger membership with a larger budget would also be welcome.

Supplemental Materials

1. Task Force Conversation Exercise

- English: https://tinyurl.com/CAD-english
- Spanish: https://tinyurl.com/CAD-espanol

2. Resources for Conversation commended by the Presiding Bishop

- "Make Me an Instrument of Peace: A Guide to Civil Discourse," online curriculum from the Office of Government Relations https://www.churchnext.tv/library/make-me-an-instrument-for-groups/109669/about/
- "Learn, Pray, Act: Resources for Responding to Racist Violence," curated by Episcopal Church staff for Racial Reconciliation and Justice and the Office of Government Relations https://www.episcopalchurch.org/responding-to-racist-violence/
- From the Center for Racial Healing and the Diocese of Atlanta https://www.centerforracialhealing.org/
- "With Malice Toward None," a program designed for churches and groups to provide a way for understanding and healing for all sides of our political divisions for both before and after the November election https://braverangels.org/what-we-do/with-malice-toward-none/

3. Dignity Resources from Dr. Donna Hicks

- https://drdonnahicks.com/
- "Ten Essential Elements of Dignity" and "Ten Temptations to Violate Dignity" https://tinyurl.com/CAD-DonnaHicks-Dignity
- Dignity Declaration: https://declaredignity.com/

Communion Partners

"Communion Partners is an episcopally led fellowship of individuals in the provinces of the Anglican Communion devoted to promoting deeper communion in the faith of the one holy catholic and apostolic Church. With evangelical fervor, we pursue and support the proclamation of the good news of Jesus Christ in word and deed. In a spirit of mutual love, we commit ourselves to honoring the authority and boundaries of our local churches, working in concert with them to pursue that unity for which our Savior prayed: "That they all may be one … so that the world might believe" (John 17:12).

Our Mission

As Communion Partners, we seek to act within the context of a shared commitment to prayer and to regular meetings for the purposes of learning, fellowship, encouragement, and common action. We actively encourage the historic bonds of affection across the Anglican Communion, as well as new networks and links between dioceses, parishes, and individuals. We also provide pastoral and theological resources for the churches of the Communion by supporting study and teaching.

Membership is open to all clergy and lay people who are prepared to endorse and uphold the traditional teaching of our several Books of Common Prayer and the principles of The Windsor Report and The Anglican Communion Covenant. Based primarily in the Anglican Church of Canada and the Episcopal Church (spanning the United States, the Caribbean, and Latin America), we seek to maintain a visible link to the whole Anglican Communion on the way to resolving important questions of faith and order.

We are committed to transparent communication with all of our colleagues, including the primates of our churches and the Archbishop of Canterbury as a focus of unity (Covenant 3.1.4), and to patient participation in the councils of the Communion."

For some members of the task force it is important to clarify that this fellowship is not and should not be interpreted to be the only way Episcopalians are in partnership with our wider Anglican Communion siblings, including but certainly not limited to the stellar work of Episcopal Relief and Development (ERD)."

For other members on the task force who self-identify as Communion Partners, it is important to clarify that the use of the term Communion Partners is not intended to imply that other Anglicans who do not maintain those requests do not also understand themselves as faithful members of the Anglican Communion.

TASK FORCE ON DIALOGUE WITH SOUTH SUDANESE ANGLICAN DIASPORA

Membership

The Rev. Ranjit Mathews, *Chair*	Connecticut, I	2021
The Rt. Rev. Alan Scarfe, *Vice-Chair*	Iowa, VI	2021
Mr. Buck Blanchard	Colorado, VI	2021
The Rt. Rev. Martin Field	West Missouri, VII	2021
Ms. Jackie Kraus	Chicago, V	2021
The Rev. Michael Paul	North Dakota, VI	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

Mr. Russell Randle left in 2019. Mr. Buck Blanchard replaced him.

Acknowledgements

The Rev. Canon Ronald C. Byrd, Sr., Office of Black Ministries

Mandate

2018-D088 Dialogue with South Sudanese Anglican Diaspora

Resolved, That the 79th General Convention call upon the Presiding Bishop to appoint a task force of two bishops, two clergy, and two lay persons to establish an official conversation for the purpose of developing a statement of understanding of the relationship with the South Sudanese American Anglican diaspora living in this country and The Episcopal Church; and be it further

Resolved, That this task force report to the Executive Council at least once each year during the coming triennium; and be it further

Resolved,That this task force conclude its work and expire no later than adjournment sine die of the 80th General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of $15,000.00 for the implementation of this resolution.

Summary of Work

During an initial virtual meeting in November 2018, it was agreed to pursue discussions on a regional or provincial basis, given the logistical and budget obstacles to conducting gatherings of the diaspora community. It was decided to schedule an in-person meeting to begin the work of the Task Force. It was held January 28-29, 2019, at Maritime Center, Linthicum Hts., MD. A total of 22 virtual monthly meetings were held between February 2019 and November 2020.

A first step agreed upon by the Task Force was a survey conducted by Bishops Field and Scarfe at the March HOB meeting to identify S. Sudanese communities, congregations and leaders in their dioceses, resulting in 90 responses. Task force members were to do likewise. Twenty-seven South Sudanese communities were identified. The objective was to prepare and arrange for one-day regional/provincial discussions with the South Sudanese Anglican Diaspora (SSAD) at appropriate locations around the continental U.S. It was agreed that consultations should occur with key SSAD leaders as to their expectations for such consultations and how they should occur. The objective is to seek to arrive at a mutually workable path forward towards engagement, mutual learning and mutual spiritual enrichment between the SSAD community and TEC, recognizing the gifts each community brings to these conversations.

The Rev. Canon Ron Byrd offered financial support and expertise from the Office of Black Ministries. The Task Force applied for a $52,000 grant from the Constable Fund to bring the SSAD community together for five conferences in 2020 in different regions of the U.S. The grant was approved.
A Steering Committee was formed to plan an initial conference April 30-May 2, 2020 in Kansas City, MO. Bishop Field agreed to liaise with the Steering Committee for the Task Force. The Task Force recruited the Rev. Stan Runnels and the Rev. Moses Thon Chol to co-chair the Steering Committee. A virtual meeting was held January 13, 2020. Members are the Rev. Moses Thon Chol, the Rev. Zachariah Char, the Rev. John Deng, the Rev. Stan Runnels, and the Rev. Dr. Rich Jones. The Task Force asked the Steering Committee to frame their work around a "Statement of Purposes and Desired Outcomes", consisting of seven purposes, as follows:

1. Identify SSAD Anglican/Episcopal clergy in the U.S & build a database.
2. Invite SSAD clergy to engage with TEC in a more integrated way.
3. Begin to identify a path and process to "regularize" in TEC the ordinations and standing of SSAD clergy, and to form educational pathways for additional professional education of SSAD clergy.
4. Identify worshiping communities of SSAD people and build a database of locations, leaders (lay and clergy), and investigate how they integrate with TEC churches.
5. By listening and dialogue, identify the obstacles to achieving Purposes 3 & 4.
6. Establish a path by which this dialogue can be continued and enriched during the triennium.
7. Assist the TEC-SSAD Task Force to formulate recommendations to the next General Convention.

Due to the COVID-19 pandemic, discussion turned toward alternative dates for this Conference and the Task Force began working with a date in September. At the virtual meeting of the Task Force, May 27, 2020, it was announced that non-essential travel was canceled by TEC, indefinitely, thus canceling plans for the SSAD Clergy Conference, sponsored by The Episcopal Church's South Sudanese Diaspora Task Force, indefinitely.

The $52,000.00 Constable Fund grant still applies. The Task Force was not able to hold the necessary conversations with the SSAD, thus undermining the Task Force's ability to carry out this mandate. Even though in-person meetings have not been possible, and the planned conference has had to be delayed, the Task Force has remained active. The Task Force, with the assistance and leadership of the Steering Committee, has identified SSAD leaders and had conversations with them concerning how best to proceed under the circumstances.

The Task Force is currently planning virtual conferences and compiling dates to move forward. The Steering Committee is now tasked with setting dates for four Zoom conference "listening sessions". Each will include 12 attendees – two Task Force members, nine or ten South Sudanese Anglican Diaspora (men and women), plus a facilitator. Those conversations are anticipated to help develop meaningful topics of conversation for the in-person conference, whenever it is safe to hold that gathering.

The Task Force believes the work remains essential and requests the Task Force be continued for the next triennium to pursue its vital work.

Proposed resolutions

A004 Continue Task Force on Dialogue with South Sudanese Anglican Diaspora

Resolved, the House of ____ concurring, That the 80th General Convention extend the work of the Task Force on Dialogue with South Sudanese Anglican Diaspora for the coming triennium; and be it further

Resolved, That the task force report to the Executive Council at least once each year during the coming triennium; and be it further

Resolved, That the task force conclude its work and expire no later than adjournment sine die of the 81st General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of $25,000 for the implementation of this resolution.

EXPLANATION

The 79th General Convention of The Episcopal Church approved Resolution 2018-D088 which called upon the Presiding Bishop to appoint a task force named the Task Force on Dialogue with South Sudanese Anglican Diaspora (Task Force) and consisting of two bishops, two clergy, and two laypersons. The Task Force was tasked with establishing an official conversation with the South Sudanese-American Anglican Diaspora (SSAAD) living in the United States and to develop a statement of understanding regarding the relationship of SSAAD communities and members and The Episcopal Church (TEC).

The Task Force was duly formed and met once in person and on numerous occasions virtually during the triennium. To carry out its mandate, the Task Force intended to host an in-person conference in the spring of 2020 to bring together leaders of SSAAD communities and members of the Task Force. The purpose of the conference was:

1. to discuss the substance of 2018-D088;
2. to examine the relationship of SSAAD members and communities with TEC as well as its dioceses and local churches; and
3. to ascertain the steps and actions needed more fully and appropriately to incorporate local SSAAD communities into the fabric of TEC.

Unfortunately, shortly before the in-person conference was to convene, the world-wide COVID-19 pandemic interrupted all in-person meetings. Therefore, the Task Force was not able to hold the necessary conversations with the SSAAD, thus undermining the Task Force's ability to carry out its mandate.

Even though in-person meetings have not been possible, and the planned conference has had to be delayed, the Task Force has remained active. The Task Force has held regular meetings by Zoom, typically once per month. The Task Force has liaised with the Rev. Canon Ron Byrd and the Office of Black Ministries. The Task Force, with the assistance and leadership of a Steering Committee (formed to help with the logistics and planning of the in-person conference), has identified South Sudanese Anglican Diaspora leaders and had conversations with them concerning how best to proceed under the circumstances. The Task Force is currently planning for virtual conferences and compiling potential dates to move forward. The Steering Committee is now tasked with setting dates for four to six Zoom conference "listening sessions." Each will include 12 attendees – two task force members, nine or 10 members of the South Sudanese Diaspora (men and women), plus a facilitator. The Steering Committee will guide the conversations. Those conversations are anticipated to help develop meaningful topics of conversation for the in-person conference, whenever it is safe to hold that gathering.

The Task Force believes the work remains essential and requests the Task Force be continued for the next triennium to pursue its vital work.

Continuance recommendation

We request that the House of Deputies in consultation with the GCO, allow this Task Force to continue our mandated work past the next General Convention (80) and into the next triennium.

TASK FORCE ON DISABILITY & DEAF ACCESS

Membership

The Rev. Twila Smith, *Chair*	Western New York, II	2021
Ms. Sarah Watkins, *Vice-Chair*	Texas, VII	2021
The Rev. Dr. Eugene (Gene) Bourquin	New York, II	2021
Ms. Carrie Brown	Maryland, III	2021
The Rev. Suzanne Johnston	Rochester, II	2021
Ms. Cass Martensen	San Diego, VIII	2021
Mr. Gary Moore	Central Gulf Coast, IV	2021
The Rt. Rev. Mark Van Koevering	Lexington, IV	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rt. Rev. Rob Skirving, East Carolina (2019); no replacement

Mandate

2018-D097 Establish an Advisory Council on Disability and Deaf Access

Resolved, That the 79th General Convention reaffirm and renew its previous commitments to Resolutions 2003-D051 and 2015-D043, which require the Church to provide persons with disabilities and Deaf people with full independent accessibility to all official and ancillary events of the Church, including worship; and be it further

Resolved, That the 79th General Convention establish a Task Force to review progress made toward full compliance with the Americans with Disabilities Act (ADA) and any other relevant statutes; consult with Church staff to ensure that materials, policies, and procedures for accessibility and reasonable accommodations are developed and implemented for each General Convention and ancillary Church events; and develop a means of reconciliation with people who have been excluded from Church events due to lack of accessibility or failure to provide reasonable accommodations; and be it further

Resolved, That the Task Force shall consist of between five and nine members, to be appointed jointly by the President of the House of Deputies and the Presiding Bishop, and a majority of the members shall be people with disabilities and deaf people, and be it further

Resolved, That the Task Force include such progress in their report to the 80th General Convention on their work.

Summary of Work

Task Force Composition and Perspective

The Task Force on Disability and Deaf Access includes members who are Deaf and hard of hearing, have physical disabilities, vision loss, and mental health disabilities, and a parent of a person with neurological disabilities and autism. We recognize that our membership is not fully inclusive of all experiences and perspectives.

Early on, as we considered which perspectives we were missing, we were intentional in thinking as broadly as possible about the issues under our charge and the people they impact, while recognizing that our work and this report may fall short of this goal, particularly as it relates to barriers and discrimination faced by autistic people, Deafblind people, persons with intellectual and developmental disabilities, and people who experience discrimination at the intersection of disability/Deaf and other marginalized identities.

In undertaking our charge, we focused primarily on the impacts of ableism and audism on Deaf/deaf and hard of hearing people and people with disabilities, in their experiences of Church, and did not extensively cover the impacts on family members and loved ones.

Terminology

This report highlights how people with disabilities and people who are Deaf/deaf and hard of hearing continue to experience prejudice, discrimination, and barriers to full inclusion in the life and ministries of The Episcopal Church. The Task Force recognizes that readers of this report have varying degrees of familiarity with issues surrounding disability and hearing differences, and as such, as it is important to define terminology we have used on our Task Force and in this report. We also believe that understanding this terminology is important for the work of the Church. We acknowledge that we have primarily approached this language and these issues from the perspective of people with disabilities and Deaf/deaf and hard of hearing people in the United States, and that appropriate or accepted terms may differ from country to country, as well as by language.

"Person First" and "Identity First" Language

Both people with disabilities and Deaf/deaf and hard of hearing people have experienced a long history of exclusion and segregation and have been "labeled" and "othered" by the medical profession, the church, and society at large. Seeking to redefine themselves, for themselves, both Deaf/deaf and hard of hearing people and people with disabilities have developed preferred terms and language to label themselves and build positive identities. Language and terminology that is considered acceptable to people with disabilities and Deaf/deaf and hard of hearing people is constantly evolving and opinions on what words to use and who can use them are, like the Deaf/deaf and disability communities themselves, extremely diverse. Many people with disabilities, having had their personhood diminished by medical labels and offensive slurs that they did not choose for themselves, believe it is important to be seen as a person, first, and then as someone with a disability. Person-first language acknowledges that people with disabilities are people, first. People who use person-first language may have disabilities and those disabilities may be an important part of who they are, but they are not defined by them. Person-first language is especially common among people with intellectual and developmental disabilities. In most cases, person-first language is acceptable for people who do not have disabilities to use when referring to people who do.

Still other people with disabilities and Deaf/deaf and hard of hearing people have developed political, social, and cultural identities and a sense of "disability pride" or "Deaf pride" that is inextricably bound up with who they are as individuals. For these people, being Deaf or disabled is an integral part of their identities, and they may choose to use identity-first language rather than person-first language. The use of identity-first language is especially common among Deaf, blind, and autistic people, but is used by people with all types of disabilities.

In this report, we have largely used person-first language, recognizing that this is an established and accepted practice when writing about disability, especially in the United States. We acknowledge that it can be complex to understand when it is appropriate to use identity-first or person-first language and, for this reason, we encourage that all people seeking to navigate these issues:

- Uplift and use language that recognizes the personhood and diverse humanity of people with disabilities and Deaf/deaf and hard of hearing people
- Avoid the use of slurs and offensive language, as well as metaphors that equate disability and hearing differences with sin, failing, or negativity, and;
- Honor individual and community preferences for identity-first or person-first language.

Use of the terms "ableism" and "audism"

Throughout this report, we use the terms "ableism" and "audism" to refer to prejudice and systemic discrimination against people with disabilities and Deaf/deaf and hard of hearing people, respectively. The terms ableism and audism were coined in the late 1970s by disability/Deaf activists and scholars and have become more widely used in recent years. The effects of audism and ableism are most deeply experienced by Deaf/deaf and hard of hearing people and people with disabilities, but as with racism, sexism and other forms of systemic discrimination, they also have pervasive negative impacts on other individuals, and indeed on the Church and society as a whole.

Use of the term "disability"

As part of our charge relates to an evaluation of The Episcopal Church's compliance with Americans with Disabilities Act (ADA), we have chosen to define "disability" in similar terms to the definition provided by the ADA. For our purposes, a disability is an “impairment that substantially limits one or more major life activities.” The ADA also recognizes that people who have a history of a disabling impairment or are perceived by others to have an impairment, are also people with disabilities. This definition resonated with our goal to interpret our charge in the broadest terms possible.

The ADA does not provide a list of qualifying disabilities, and neither do we want to be in a position to determine who has a disability and who does not. That said, we acknowledge that disabilities can include physical, intellectual, developmental, mental health, chronic illness and other conditions. We also acknowledge that not everyone with a disability has or is able to access a clear medical diagnosis and that diagnosis should not be the only criteria by which disability, or the need for accommodations, is determined.

Use of the term “Deaf/deaf and hard of hearing”

The distinction between the terms “Deaf” and “deaf and hard of hearing” is important to our work and recommendations as a Task Force and to the work of the Church. Deaf (with a capital “D”) refers to people whose complete or partial inability to hear is not just a physical difference, but also a sign of identification with a distinct Deaf community and culture. People who are Deaf are often native users of American Sign Language (ASL) or other signed languages, and primarily or exclusively use sign to communicate. For Deaf people, the use of ASL or another signed language is not just a method of communication, but a critical part of Deaf identity, community, and culture.

When written with a lowercase “d,” “deaf and hard of hearing” refers to people whose complete or partial inability to hear is an audiological condition. People who are deaf and hard of hearing primarily use or prefer English or other spoken languages for communication and may have limited or no proficiency in signed languages. Also, deaf and hard of hearing people generally do not identify with Deaf culture or participate in Deaf community.

It is also important to note that spoken and signed languages are completely different from one another in terms of grammar, structure, and vocabulary. Just because someone is fluent in a spoken language does not mean that they are fluent in a signed language and vice versa. There are also diverse and distinct signed languages. American Sign Language is used primarily by Deaf people in the United States and Canada, and there are many other signed languages used by Deaf people across The Episcopal Church and the Anglican Communion.

The term “deaf and hard of hearing” also includes people who are Deafblind, which encompasses a significant number of individuals with both hearing differences and vision loss. People who are Deafblind often use tactile (hand-in-hand) sign language or low vision signing to receive communication.

For more information on this topic, go to the National Association of the Deaf website, nad.org.

Why a Distinction Between Disability and Deaf?

In the United States and other countries where The Episcopal Church is present, there is a growing body of law that recognizes, defines, and protects the human and civil rights of people with disabilities and Deaf/deaf and hard of hearing people. Rather than creating distinct legal protections for Deaf/deaf and hard of hearing people and people with disabilities, the authors of many such civil and human rights laws have chosen to define "disability" as a broad category which includes Deaf/deaf and hard of hearing people, granting rights and protections to all who experience the discrimination and structural inequalities of ableism or audism.

However, as the Task Force, we recognize that legal definitions of disability do not reflect the identities of people in the Deaf community. For Deaf people (with a capital D), the inability to hear is not a disability, but a difference, and the use of American Sign Language (ASL) or other signed languages is an important part of Deaf culture.

As such, we highlight the difference between Deaf and disability, making a distinction between the two in our Task Force name, while acknowledging that Deaf people and people with disabilities experience similar barriers to full inclusion in the life of The Episcopal Church.

Full Inclusion: A Gain for the Church

A commitment to dismantling ableism and audism and promoting full inclusion in the life and leadership of The Episcopal Church requires that we orient ourselves away from the notion that disability and hearing differences are exclusively, or even primarily, a human deficit to be overcome. The Task Force recognizes the blessings and gains that people with disabilities and Deaf/deaf and hard of hearing people bring to the Church, not despite, but because of their disabilities and hearing differences, and calls on The Episcopal Church to take proactive steps to do the same.

For example, American Sign Language not only expresses, but literally embodies the scripture narratives and liturgies, making them visible and tangible in ways that written and spoken language cannot. These gifts should not only be made apparent by means of accessibility, but also honored with deep listening and watching by the Church. Equipping Deaf people for lay and ordained ministry in American Sign Language and other signed languages strengthens not just Deaf congregations, but the whole Church.

Deaf people and people with all types of disabilities have lived experiences that offer unique perspectives on scriptural interpretation and how we as Christians understand and relate to the life of Jesus Christ – all of which add immeasurably to the richness of our faith and traditions. The gifts that Deaf/deaf and hard of hearing people and people with disabilities have for The Episcopal Church will remain unrealized as long as we continue to place barriers to ministry and dismiss possibilities out of concerns for expense or difficulty, or fail to reimagine existing systems and ministries to fit the gifts, talents, and perspectives that Deaf/deaf and disabled people bring.

Analysis of Compliance with the Americans with Disabilities Act (ADA)

The Americans with Disabilities Act (ADA) was first enacted in 1990 and the current text reflects amendments, most recently in 2008. The ADA appears in the United States Code, with the original law codified in 42 U.S.C. § 12101. The findings of Congress, found in Section 12101 and presented in part below, serve as an overview of the intent for Equal Opportunity for Individuals with Disabilities. (See ada.gov for details.)

Brief analysis of the Church's compliance, regarding participation, ministry, leadership, formation, and employment, are offered below. It is important to note that while entities of the Church are largely exempt from ADA requirements, as a Task Force we consider our baptismal covenant and the message of the Gospel. We also recognize that the language of the ADA is largely about access and, in our view, this is a limiting perspective. As noted previously, there is much for the Episcopal Church to gain from the full inclusion and gifts of persons with disabilities and Deaf/deaf and hard of hearing people.

The first portion of each item below, in italic text, references language from the ADA. We recognize that some language in the ADA is now considered dated.

> *"Physical or mental disabilities in no way diminish a person's right to fully participate in all aspects of society, yet many people with physical or mental disabilities have been precluded from doing so because of discrimination; others who have a record of a disability or are regarded as having a disability also have been subjected to discrimination …"*

We affirm that Deaf persons and people with disabilities are full members of Beloved Community and should have full access to participation in the life of The Episcopal Church and its ministries. We also recognize that many still face challenges and barriers to be seen as capable of serving with the fullness of their God-given gifts and abilities. We are aware that many of our church buildings, educational institutions, camps, and conference centers continue to present barriers to physical, cultural, and programmatic access. We know that attitudinal barriers and systems of The Episcopal Church perpetuate ableism and audism, which continue to keep people away from experiences of worship, formation, leadership, and church community. We grieve that people continue to face discrimination because they have disabilities and/or are Deaf/deaf and hard of hearing. We know that we cannot fully be Beloved Community when any among us face barriers to inclusion.

> *"Historically, society has tended to isolate and segregate individuals with disabilities, and, despite some improvements, such forms of discrimination against individuals with disabilities continue to be a serious and pervasive social problem …"*

Physically, persons with disabilities are all too often isolated or segregated to the margins – literally – of church spaces. Many of our buildings, often historic, are still not physically accessible; in some, persons may come inside, yet not be able to reach spaces for communion, classes, and fellowship. Persons with intellectual and developmental disabilities still experience exclusion from church gatherings, worship, and formation. Deaf/deaf and hard of hearing people are marginalized through lack of linguistic and cultural access to the Word of God, the liturgies of the church, and in fellowship, formation, and pastoral care.

> *"Discrimination against individuals with disabilities persists in such critical areas as employment, housing, public accommodations, education, transportation, communication, recreation, institutionalization, health services, voting, and access to public services ..."*

In the Church, it is vital that we consider how we engage persons with disabilities and the Deaf/deaf and hard of hearing through employment, lay and clergy leadership, education, and communications. Do we understand where we are underrepresented? Where we remain inaccessible? Do we know the transportation barriers that keep members away from church meetings, and recognize those who have been unable to fully access and participate in our schools, camps, and conference centers? Despite our intentions of full inclusion, are we aware that micro-aggressions and discrimination persist? Are we committed to change?

> *"Unlike individuals who have experienced discrimination on the basis of race, color, sex, national origin, religion, or age, individuals who have experienced discrimination on the basis of disability have often had no legal recourse to redress such discrimination …"*

When anyone faces discrimination, it hurts all of us. We recognize that discrimination persists in the church and especially grieve the history of injustices toward persons on the basis of race and color. We also recognize that many in the church face discrimination on the basis of multiple factors, which can compound experiences of injustice. Addressing discrimination requires us to acknowledge individuals impacted by ableism, audism, and all forms of oppression, and commit to removing systemic barriers in the Church and society. Even where we may be exempt from legal requirements to do so, the commitment to our baptismal covenant must obligate us to pursue these efforts as a matter of justice.

> *"Individuals with disabilities continually encounter various forms of discrimination, including outright intentional exclusion, the discriminatory effects of architectural, transportation, and communication barriers, overprotective rules and policies, failure to make modifications to existing facilities and practices, exclusionary qualification standards and criteria, segregation, and relegation to lesser services, programs, activities, benefits, jobs, or other opportunities …"*

It is our sincere hope that exclusion perpetuated by The Episcopal Church is not intentional. Regardless of the intent, however, the impact is the same. At all levels, we must ask ourselves and those affected what barriers remain. What rules and policies, facilities and practices, need modification? Where do exclusionary qualification standards and criteria remain? Where and how do we segregate persons with disabilities and those who are Deaf/deaf and hard of hearing? How can we improve access and inclusion in worship, programs, and activities? In all areas and aspects of the church – when we examine ourselves honestly – do we recognize persons with disabilities and those who are Deaf/deaf and hard of hearing as fully capable and fully included, participating and leading? Are we willing to commit resources to this end? If not, why not?

> *"Census data, national polls, and other studies have documented that people with disabilities, as a group, occupy an inferior status in our society, and are severely disadvantaged socially, vocationally, economically, and educationally …"*

Our baptismal covenant calls us to "strive for justice and peace among all people and respect the dignity of every human being." The work of advocacy alongside persons with disabilities and those who are Deaf/deaf and hard of hearing continues to be important and we affirm the faithful work of the Office of Government Relations, the Episcopal Public Policy Network, dioceses, and individual congregations and ministries in this arena.

> *"The Nation's proper goals regarding individuals with disabilities are to assure equality of opportunity, full participation, independent living, and economic self-sufficiency for such individuals …"*

"Equality of opportunity" and "full participation" remain unrealized, "proper goals" within the church; the need for our support in all of these areas, in society, remains.

> *"The continuing existence of unfair and unnecessary discrimination and prejudice denies people with disabilities the opportunity to compete on an equal basis and to pursue (opportunities) …"*

In the Church, this comes back to fully being Beloved Community. When one person is denied the opportunity to reach the altar, to serve in leadership, to worship and learn and experience the fullness of community, we are not yet Beloved Community.

Prayer Resources and Litany of Repentance

Part of our charge was to consider resources for reconciliation for persons who have been excluded from church events. The following prayers are offered, which encompass experiences both inside and outside the church. The Litany of Repentance is offered as a step toward reconciliation.

Prayer for use by persons with disabilities and/or who are Deaf or hard of hearing:

> God our Creator, by whom we are each wondrously made: you made me in your image, equip me with gifts, and pour your love into me; when people see me as different, other, unable, unworthy, broken, scarred, wounded, and anything less than whole, grant me courage and forbearance while you work in them; when I am weary of questions, stares, barriers, intrusions, indignities, oppression, and injustice, ease my burdens; when I am in pain, in body or soul, give me your comfort, healing, and peace; where you and the world need what I can uniquely offer, send me to serve in your Name; and help me remember, in and through all things, that you call me Beloved; through Jesus Christ our Savior. Amen.

Prayer for use by people who love and care for someone with disabilities and/or who is Deaf or hard of hearing; note that this uses the pronouns "they/them," which may be substituted with pronouns preferred by the person included in the prayer:

God our Creator, by whom we are each wondrously made: you made (Name) in your image, equip them with gifts, and pour your love into them; when people see them as different, other, unable, unworthy, broken, scarred, wounded, and anything less than whole, grant me the courage to ask how I can be their best ally; when I see them in these ways, forgive me and break open my understanding; when either of us are weary of questions, stares, barriers, intrusions, indignities, oppression, and injustice, give me the courage to stay beside them, learn from their perspective, and ask what they would have me do; when they are in pain, in body or soul, teach me to be present and ask how to comfort and support them; help me honor the gifts you bring forth in them; and grant that, in and through all things, I acknowledge them as Beloved, as you yourself have named them; through Jesus Christ our Savior. Amen.

Prayer for use by a congregation or church body:

O God, who calls us into Beloved Community and sends us into the world as witnesses to your love: help us understand who is missing from this gathering (congregation, church), whose gifts we have limited, and forgive us for the barriers we place between your church and your people. Open our ministries, open our minds and our hearts, to include people whose gifts we have failed to honor, people we have believed unable to serve and to lead, and all we have failed to fully recognize as whole and holy. Help us remove the stumbling blocks between us and the community you call us to be; teach us to create new spaces, build new tables, and transform your church; and remind us, always, that people we may identify with disabilities, you have already named as Beloved; through Jesus Christ our Savior. Amen.

Litany of Repentance

Dear people of God, our church and our collective history bears the wounds of limitations, barriers, and oppression that we place between ourselves and those who differ from us. We do not fully respect human dignity.

We have failed to honor the ways you have wondrously made your children, failed to realize the gifts you have given, and not loved with the same love you pour out. The sins of the past and of our present day keep us from being the Beloved Community you intend.

We have created obstacles to reach spaces we hold dear, including the altars where we break bread and acknowledge the wounds of Jesus. We have not removed them even when made aware of their presence.

We have not respected the dignity of one another, as we vow in our baptism. We name inabilities and limitations instead of recognizing our siblings in Christ who are whole and holy. We have created barriers to learn, to serve, and to lead.

With our actions and inaction, in small ways and great, in things we do not even recognize, we have contributed to the disabling of other people.

As followers of Jesus Christ, we reject the oppression of other human beings on the basis of disabilities, differences, and the rich variety of ways God enables us to live and move and have our being.

We also recognize the temporary nature of our human condition and that many of us take for granted particular abilities we may now possess, including characteristics that are physical, intellectual, and related to our mental health.

As members of Christ's beloved community, we must work alongside all God's children, building up the gifts in each other and serving together for the sake of God's mission in the world.

In the assurance of forgiveness, let us be fully present before God and humbly confess our sins: our participation in disabling and "othering," our contributions to oppression, and our perpetuation of barriers and exclusion.

Silence is then kept for a time

God the Father, you created your people and called us Beloved, yet barriers and limits of our own making have separated us. *Have mercy on us.*

God the Son, you healed your people and restored them to community, yet the damage we cause continues to wound your body. *Have mercy on us.*

God the Holy Spirit, you stir among us, yet we fail to be aware of the gifts you bring near to us and the people you are enlivening in our communities. *Have mercy on us.*

We have celebrated our own abilities, while failing to acknowledge the full humanity of persons we deem less able than ourselves; we have limited the gifts that persons with disabilities and who are Deaf or hard of hearing bring to the Church. *Have mercy on us.*

We have failed to understand discrimination through the perspective of persons with disabilities and those who are Deaf and hard of hearing. We have not condemned behaviors and practices that limit and hurt God's children. *Have mercy on us.*

We have overlooked barriers and inequality in our church and our communities, and not acknowledged the limits that places on all of us. *Have mercy on us.*

We have practiced injustice with economic justification and not worked to relieve burdens that oppress others when we ourselves seem unaffected. *Have mercy on us.*

We have denied access to our churches and other sacred spaces, and even to Christ's table, with barriers we have created. We have failed to provide accommodations that enable full inclusion. We have preferred historic buildings and aesthetics over access. *Have mercy on us.*

We have limited access to events, meetings, conferences, camps, and seminaries, and chosen convenience over inclusion, without acknowledging the people we harm and the gifts this denies us. *Have mercy on us.*

We have erected unreasonable barriers that limit the vocations of people called to serve God through the Church, including access to formal discernment and formation for holy orders. *Have mercy on us.*

We have built ourselves up and held tightly on our own power by insisting on "fixing" circumstances for other people, in ways we ourselves choose, and have not asked about their needs or perspectives. *Have mercy on us.*

We speak of categories and conditions, we use labels and diagnoses, and fail to acknowledge personhood. *Have mercy on us.*

We have been impatient with people who learn and process experiences in ways different from our own. *Have mercy on us.*

We have separated ourselves from others, refusing to be present in ways that would help us understand and learn from their experiences. *Have mercy on us.*

We have disregarded people who need our help and not seen them as worthy of our love and care. *Have mercy on us.*

We have been fearful of people who are different from us. We have turned away. *Have mercy on us.*

We have ignored the sufferings of our siblings in Christ. *Have mercy on us.*

We have been satisfied with what is and who this excludes, while failing to recognize what could be. *Have mercy on us.*

Despite our intentions, we have not had the will and the courage to act in love for the sake of all God's people. *Have mercy on us.*

Lord have mercy. *Christ have mercy.* Lord have mercy.

May Almighty God have mercy on us, grant us the strength and conviction to love as you would have us love, and to acknowledge the many and varied gifts you give each of your children. Where there has been separation, may God reconcile us. Make us inclusive in God's church, bold in our actions in the world, and ever more compassionate in our love toward one another, that we may help realize the Beloved Community we are called to live into each day. Amen.

Recommendations

Formation and Ordination

We acknowledge that barriers remain which limit the vocations of people called to serve God through the Church, including access to formal discernment and formation for holy orders. We recognize barriers in language, culture, and physical space, and financial constraints, have limited access to ordination processes and formation. We encourage accessible alternatives in formation at all levels, with specific attention to formation for ordination. We commit to recommending alternatives in future work of this Task Force and collaborative efforts of the Episcopal Conference of the Deaf and a Disability Advisory Group.

Language Access

We urge the Church to be attentive to communication access needs at all levels, including diocesan conventions, churchwide formation, and congregational worship and programs.

Specific communication access requests for persons who are Deaf or hard of hearing should always be provided as a reasonable accommodation for full participation in meetings and activities of The Episcopal Church, whether the request is for American Sign Language interpretation or Communication Access Realtime Translation (CART) services. Deaf persons who request ASL interpretation should be provided with ASL; persons who are deaf and hard of hearing, who primarily use English, should be provided with captioning, Communication Access Realtime Translation (CART), or other services to meet communication needs.

- CART is used to transcribe spoken English into written English, while sign language interpretation is used to render American Sign Language (ASL) into spoken English and spoken English into ASL. It is also important to note that ASL is not the only signed language in use within the Episcopal Church.
- The reason why both ASL interpretation and CART services may be necessary is because some Deaf/deaf and hard of hearing people primarily communicate using English, while others use ASL. ASL and English are distinct languages and not all Deaf/deaf and hard of hearing people are able to use both for communication.
- Deaf persons who are native users of ASL should be provided with ASL; persons who are deaf and hard of hearing, who primarily use English, should be provided with captioning, Communication Access Realtime Translation (CART), or other services to meet communication needs. While captioning and CART technology may be useful for many in the Church, including persons who do not identify as Deaf/deaf, it does not "replace" ASL as a language.

Liturgy

We encourage official revisions of the Book of Common Prayer, and all liturgies written for use in the Church, to use language that acknowledges the personhood of Deaf/deaf and hard of hearing people and people with disabilities, rather than categorizing by afflictions, conditions, and other general descriptors, such as referring to "the homeless." As language and usage is ever-evolving, we strongly recommend consulting with Deaf and disability communities when revising liturgical language.

All references that use terminology of disabilities or deaf as metaphors for sins or failings should be revised. Specifically, we draw attention to:

- The Litany of Repentance for Ash Wednesday (BCP, p. 267), "We have been *deaf* to your call to serve …"
- The Good Friday prayer (BCP, p. 279), which focuses on conditions without acknowledging personhood, referring to "the sick, the wounded, and the crippled." Here, the term "crippled" is especially problematic, as it has been considered pejorative since the 1970s and is offensive to many persons with disabilities. For this line of the prayer, we recommend: "For people who are sick, wounded, or who have disabilities."

As acceptable terminology used to refer to Deaf/deaf and hard of hearing people and people with disabilities may vary between countries and languages, we strongly recommend that local Deaf and disability communities be consulted whenever The Book of Common Prayer is being translated or retranslated.

Funding

We note the importance of having persons with disabilities and Deaf/deaf or hard of hearing people serving on interim bodies of General Convention and in leadership roles at all levels of the Church. We recognize that access and representation often require allocation of funding for reasonable accommodations. We are pleased that the Office of General Convention made arrangements for the cost of interpreting, providing language accessibility for this Task Force.

In the legislative work of General Convention, and in Diocesan Conventions, we note that resolutions often require adequate and specific allocations of funds to achieve the goals approved; we urge continued work with fiduciary bodies of the Church in order to achieve goals passed in such resolutions. Creating justice in the present and future Church requires appropriate allocation of funds, which should be considered by leadership bodies at all levels.

Gratitude

- We commend the work of the Episcopal Public Policy Network, and the Office of Government Relations for their efforts in work connected to the concerns of people with disabilities and Deaf/deaf and hard of hearing people.
- We acknowledge the work of General Convention and contributions in dioceses, congregations, and other entities of the Church, where progress has been made toward more full inclusion of people with disabilities and Deaf/deaf and hard of hearing people.
- We are grateful for the work of the Episcopal Conference of the Deaf, the former Episcopal Disability Network, and the many individuals who have paved the way for our work in the Episcopal Church today.

Continuance recommendation

We recommend continuation of the Task Force on Disability and Deaf Access, as current members are able to do so, until the next, in-person General Convention.

Part of the work of this task force includes providing resources for persons with disabilities and who are Deaf/deaf and hard of hearing who may attend General Convention, as well as consulting with organizers of General Convention on communication and other accessibility needs.

As this group has not used the funds allocated for its work, we request that access to such funds be granted through the next in-person convention.

We envision the following timeline:

February-June 2021 – Curation of resources, focus groups; discussion and action regarding further recommendations, consideration of possible future resolutions and advocacy; and communication with General Convention staff regarding accessibility for online meetings of Convention in 2021.

July-December 2021 – Preparation of resources/guide for in-person General Convention in July 2022 and arrangements for presence at Convention; continued communication regarding accessibility of online meetings prior to in-person General Convention and the anticipated in-person General Convention in 2022; and continued curation of resources to make available online.

January-July 2022 – Final preparation of materials, resources, etc., and presence at General Convention.

Disability Advisory Group

We recommend formation of an on-going Disability Advisory Group, to:

- Offer support for individuals with disabilities
- Collaborate with the Episcopal Conference of the Deaf
- Collaborate with disability organizations of other denominations
- Curate resources and make such resources available online
- Consult and offer support for congregations, dioceses, and other church institutions and leadership bodies
- Support advocacy and education

Recognition in the Church

We recommend that the Episcopal Church recognize the presence of the Episcopal Conference of the Deaf and a Disability Advisory Group, and other appropriate means, so that there is:

- A continued place for the work of people with disabilities and Deaf/deaf and hard of hearing people in church-wide structures, rather than representation requiring legislation of General Convention every triennium
- Representation for both the Episcopal Conference of the Deaf and a Disability Advisory Group online at episcopalchurch.org, enabling access and connection.

TASK FORCE ON FORMATION & MINISTRY OF THE BAPTIZED

Membership

Dr. Lisa Kimball, *Chair*	Washington, III	2021
The Rt. Rev. J. Russell Kendrick, *Vice-Chair*	Central Gulf Coast, IV	2021
The Rev. Paul Aparicio	Fond du Lac, V	2021
Ms. Lisa Brown	Pittsburgh, III	2021
The Rev. Canon Lydia Kelsey Bucklin	Northern Michigan, V	2021
The Rev. Heather Erickson	Los Angeles, VIII	2021
The Rt. Rev. Carol Gallagher	Massachusetts, I	2021
The Rev. Canon Timothy Hodapp	Connecticut, I	2021
Ms. Demi Prentiss	Dallas, VII	2021
Ms. Melissa Rau	Southwest Florida, IV	2021
The Hon. Byron Rushing	Massachusetts, I	2021
The Rev. Peter Wong	Central Gulf Coast, IV	2021
The Rt. Rev. Robert Wright	Atlanta, IV	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rev. Dr. Susanna Singer (Chair) resigned in January 2019 due to family demands, and Dr. Lisa Kimball agreed to assume the responsibility of Chair. The Rev. Heather Erickson was then appointed to join the Task Force to maintain its original size.

Mandate

2018-C005 Appoint Task Force to Study Implementation of Canon III.1

Resolved, that the 79th General Convention direct the President of the House of Deputies and the Presiding Bishop of The Episcopal Church to appoint a Task Force on Formation and Ministry of the Baptized including members experienced in Christian formation and education, and consisting of a minimum of two bishops, five (5) priests and/or deacons and five (5) lay persons, who represent the diversity of the Church; and be it further

Resolved, that this task force identify or develop curricula, practices, and strategies that can be used by dioceses and congregations to encourage and engage all the baptized in the work of building up the church by identifying their gifts for ministry, employing their gifts for ministry, and focusing on full engagement of their ministries in daily life, work, and leisure; and be it further

Resolved, that this task force report to the 80th General Convention with recommended strategies for the affirmation, development, and exercise of ministry by all baptized persons in the areas of gifts discernment, education and training for ministry, and leadership development; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of $60,000 for the implementation of this resolution.

Summary of Work

As the Task Force on Formation and Ministry of the Baptized we have come to believe, and we submit this report as our heartfelt brief, that our beloved Episcopal Church is confronting an existential hinge point. This critical moment has overtaken us gradually and then suddenly, accelerated by the twin catalysts of the global pandemic and long overdue racial reckoning. Most certainly, as we emerge from these times of testing, "we shall all be changed" (1 Corinthians 15:51). Our future as "the Episcopal branch of the Jesus movement" will depend on engaging the whole church -- all the baptized, especially the 99.2% who identify as laity.

To create the vital corporate life that is the hallmark of God at work, we believe the Episcopal Church must act decisively, with energy, focus, and intention. We must commit the resources of the Episcopal Church to

1. Support and develop connections among existing initiatives and networks that prioritize baptismal theology; and
2. Form every baptized member as a practitioner of Jesus' Way of Love, proclaiming baptismal ministry as their calling through our intentional, daily engagement with the entire People of God.

We offer this report and the resolutions contained herein as the articulation of our case, and as our bid for your commitment to address this besetting issue which challenges us to do justice in our own house.

What is our mission?

The creation of this Task Force at the 79th General Convention acknowledges the Episcopal Church's failure to implement the stipulation of Title 3, CANON 1: *each diocese shall provide resources for the formation and ministry of all the baptized.*

In response to the Task Force's expansive mandate to "identify or develop curricula, practices, and strategies that encourage and engage all the baptized and help them to identify and employ their gifts for ministry in daily life, work, and leisure," the Task Force determined early that developing new curricula would not be prudent. We chose to focus on identifying resources and strategies that effectively align Episcopal congregational practice with the baptismal theology of The Book of Common Prayer 1979.

We discerned a three-fold path for our work:

- Use Episcopal baptismal theology
- to examine the formation practices and needs of the Church, in order to
- commend practices, resources, and institutional supports to equip and sustain Christian disciples and a thriving Church.

What does baptismal theology mean for the Episcopal Church?

To begin our process, we examined the baptismal theology embedded in the BCP 1979. We discerned that the "Prayer Over the Newly Baptized" (BCP 308) describes well both the profile of a fully-flourishing baptized person, and the focal point of our response to our mandate:

> Heavenly Father, we thank you that by water and the Holy Spirit you have bestowed upon these your servants the forgiveness of sin, and have raised them to the new life of grace. Sustain them, O Lord, in your Holy Spirit. Give them an inquiring and discerning heart, the courage to will and to persevere, a spirit to know and to love you, and the gift of joy and wonder in all your works. ("Prayer Over the Newly Baptized," The Book of Common Prayer)

We drew inspiration for understanding "ministry in daily life" as a Biblical mandate from Jesus's own witness in the Gospel of John. As Episcopalians, our faith in the Triune God requires us to incarnate both our dependence on God alone and our responsibility to love our neighbors.

> You call me Teacher and Lord—and you are right, for that is what I am. So if I, your Lord and Teacher, have washed your feet, you also ought to wash one another's feet. For I have set you an example, that you also should do as I have done to you. (John 13:13-15, NRSV)

The Iona Community "Prayer for Friday" elegantly clarifies the Task Force's operative distinction between formation for daily baptismal living (discipleship) and formation for membership in an institutional church:

O Christ, you are within each of us.

It is not just the interior of these walls:

It is our own inner being you have renewed.

We are your temple not made with hands.

We are your body.

If every wall should crumble, and every church decay,

We are your habitation.

Nearer are you than breathing,

Closer than hands and feet.

Ours are the eyes with which you in the mystery,

Look out with compassion on the world.

Yet we bless you for this place,

For your directing of us, your redeeming of us,

And your indwelling.

Take us outside, O Christ, outside holiness,

Out to where soldiers curse and nations clash

At the crossroads of the world.

So shall this building continue to be justified.

We ask it for your own name's sake.

AMEN.

How does baptismal theology inform our work?

We articulated two foundational principles on which we focused our research and fashioned our recommendations:

All who are baptized are empowered to minister the Gospel, in all places and at all times.

- In baptism, we are claimed by God and consecrated as citizens of God's reign;
- In baptism, we are equipped to join Jesus and change the world through prayer and action, motivated by love and justice;
- In baptism, we are shaped by the Spirit as disciples and sent by that same Spirit as apostolic ministers into every place where we live and work, play and pray; and,
- In baptism, we join the living Body of Christ and the great movement of saints throughout time to participate in God's mission and to build the Beloved Community.

All the baptized are called into discipleship, shaped by the Baptismal Covenant, to engage lifelong learning and ministry, by:

- Participating in expressions of faithful Christian community;
- Exercising theological imagination;
- Discerning gifts for ministry;

- Developing a rule of life rooted in spiritual practices; and
- Joining in God's mission by applying these gifts within the individual's particular context and life.

This sacred practice of lifelong learning is to be encouraged, nurtured, celebrated, and accompanied at the local level, where each baptized member's formation is embodied within a specific worshiping context and culture. A thriving church shares in God's mission by supporting all the baptized in their vocational journeys with Christ.

What is the current condition of baptismal identity and formation across the Episcopal Church?

In January 2020 we worked with the GCO office to administer--in Spanish, French, and English--a church-wide survey on formation resources and practices for all Episcopalians.

Our goal was to ascertain:

- How baptismal identity shapes ministry in church, daily life, work, and leisure;
- What curricula, practices, and strategies already exist and are being used widely and effectively by individuals and communities across the Episcopal church; and
- What barriers prevent people from growing into their full identity as baptized Christians.

We intentionally promoted the survey via social media, at church gatherings including Rooted in Jesus and the CEEP 2020 conference, and among historically underrepresented communities. We received 687 completed surveys, 55% from laity, 8% from self-identified ethnic/racial minorities, and 57% from those not raised in the Episcopal Church. Regrettably, only 25% were under the age of 50, reflecting both the aging demographic of our denomination and the difficulty reaching younger generations, who tend to be less closely affiliated with the governance of our Church.

Our findings were illustrative and clear.

As documented by previous church-wide bodies with similar mandates, and as experienced by church leaders committed to deep Christian formation, we discovered that while rich baptismal theology exists, a significant gap remains between what we believe and how we form individuals to live as Christians in the world. There is an urgent need to ground Episcopal Church practice and Episcopal identity in vows made and witnessed at the font. While we as a church who share these vows are called to declare our support with a resounding "We will," far too often we have not.

Respondents affirmed that the Christian life is a journey with God in community, where discipleship as a follower of Jesus is learned through enculturation in worship, study, service, and genuine fellowship. Yet, disappointingly, there was a pervasive tone of "I'm on my own" across the survey responses.

When mentioning the various practices, programs, and circumstances that were most conducive to spiritual growth and formation, the underlying assumption and common thread was that they occurred in relationship to other Christians. For survey respondents, spiritual growth is fostered by utilizing spiritual gift assessments in group contexts; through discernment and clearness committees; via spiritual direction with a mentor; in time spent together in an intentional community, often on retreat or at camp; and through regular engagement with others at Bible studies and adult formation offerings. Regardless of curriculum or program, the transformational catalyst that ultimately led to spiritual growth and formation was the intentional collaborative engagement and deep relational connections formed in community.

Respondents also emphasized a need to empower the laity in order to reduce clericalism. They recognized that this crucial shift requires prioritizing opportunities for lay-led faith-sharing experiences and spiritual mentoring. Survey responses clearly indicated that no program, course of study, or particular body of knowledge is enough to form confident Christians. The "magic sauce" is healthy relationships that support ongoing--God willing, life-long--theological reflection and vocational discernment.

A significant majority of respondents (over 70%) yearned for a fundamental culture shift in congregations, a re-prioritizing of resources. They longed for intentional faith formation to foster continuous discernment and discipleship in community. They hungered for a recognition of the essentials of incarnation: by virtue of being human, we are wired for relationship; by virtue of our baptism, we are equipped for ministry.

What's the problem? Why isn't the church's approach to formation "working"?

There are rich church-wide programs, resources, networks, and well-established processes to grow Christians, but our data suggests that while a core group of Episcopalians is over-resourced, many more congregations do not access or utilize what is available or they limit Christian formation to models of expert-centered instruction over experiential communal practices.

Despite the increased visibility of the Presiding Bishop and his emphasis on the Way of Love, the Beloved Community, and Embracing Evangelism, all of which are richly resourced initiatives, many of our respondents describe congregations with very limited imagination for discipleship or ministry in daily life. Respondents' formation experiences were confined to specific programs, usually "at church" and developed locally. Ministry was most often understood as acts of service in or on behalf of the congregation.

(It should be noted that after our survey was administered, the great accelerator effect of COVID-19 has pressed congregations to rethink their formation ministries. To the extent time and resources have been committed to formation-under-pandemic, programming has moved online and there is evidence of growing appreciation for the importance of faith practices in the home.)

What are the challenges we face?

The episodic nature of Christian formation at the local level is ubiquitous. The survey confirmed our own experience. By far a majority of congregations represented in the data offer a menu of Advent and Lent programming, an adult forum on Sunday mornings September through May, one weekly Bible study, and as much children's and youth formation shaped by demand and the personnel to provide it. Preparation for baptism, confirmation, and marriage most often falls to the clergy, and is offered when there is need. A culture of coherent, continuous and holistic formation from birth to death, altar to kitchen table, and Advent to Christ the King Sunday, rooted in ongoing relationships and practices, is an unrealized, distant ideal. Instead, respondents described their formation as scattershot, occasional, accidental, seasonal, heavily cognitive, and leader-dependent.

Respondents emphasized the need for and power of mentorship and good modeling. Most cited a shortage of identified Christian mentors, which places unrealistic expectations on clergy, stifles spiritual growth, and forces individuals to look beyond their local congregations for quality catechesis and theological education. Sadly, many clergy feel unprepared to teach, particularly to children and youth.

What we renounce and what we affirm in the process of ongoing conversion as Christians matters deeply; yet few respondents were able to articulate why baptism matters in daily life. It is clear there is much room to improve the teaching and practice of baptismal theology which must include regular opportunities for communal discernment of gifts and equipping for ministry in daily life. The church cries out for an increased emphasis on forming and nurturing deep relationships among fellow Christians.

Finally, maturing in faith seems to be conflated with active involvement, and is recognized almost exclusively by opportunities to serve inside the Episcopal Church at the parish, diocesan, or church-wide level, or by ordination. God's clear call to vocation in the world seems to escape the church's notice. Very few people referred explicitly to either their baptism or the Baptismal Covenant as a roadmap for daily living, with the exception of their commitment to social justice which was frequently supported by "Love your neighbor as yourself" and "Respect the dignity of every human being."

In light of all this, where is the hope?

The Episcopal tradition is well equipped to form disciples for ministry in daily life. The pattern exists theologically and liturgically, particularly in the rhythms of the daily office; the catechumenate (Book of Occasional Services 2018); the renunciations, affirmations and covenant language in Holy Baptism; and in "An Outline of the Faith" (Catechism, BCP 845).

Around the Church today, many dioceses, schools of theology, worshiping communities, networks, and publishing houses are engaged in this critical work of formation oriented toward daily life. In our survey we found good examples of existing resources and practices, and evidence of the resilience, creativity, and hunger of baptized Episcopalians to be equipped for daily life ministry in a world that is changing under our feet.

We offer the following story as an example of transformation that often goes unnoticed outside a small circle, and that kindles hope among all who are touched by it.

JO'S STORY

Josephine (Jo) is a 32-year-old wife, mother of three small children, and nutrition coach who works on the executive staff of a nationwide weight-loss and personalized meal-planning organization. "I wanted something more," she began, explaining her on-again, off-again relationship to the Episcopal Church in which she was baptized as an infant. "Sure, once my husband and I started having kids, church became important again. Passing along something of what I knew as a kid with church school and camp felt like something we should do."

When Jo's rector asked for volunteers who might be interested in learning some spiritual practices together, she signed up. "We basically learned how to listen. Who knew? And how to listen deeply, for God's voice in scripture and for God to show me what He wanted me to notice whenever I was out and about… home, neighborhood, the office, school." Then, with enthusiasm, she spoke of her small community of companions who were learning these practices together. "It took a bit of time to feel comfortable. Here I was sharing stories of my life and God and family with people who weren't close friends. And in no time, we became a small community of companions who were listening to each other's stories of where God is showing up in our lives. And then, we began to discern what these practices might mean for our parish." Then COVID-19 hit "and the world tipped." In the months following the onslaught of the pandemic, the small group continues to gather, dwelling in God's word and listening, discerning, what God may be inviting the group to see. "This whole pandemic means something different to me because of what I've learned with this group," Jo said. "I trust my peeps with these stories of my life. And they trust me. Also, in some small significant ways, I'm meeting Jesus out there in the eyes of the girl in the produce aisle, online with my colleagues in endless meetings, and with parishioners on Sundays, in my husband and my kids. For the first time in my life I feel like I'm meeting Jesus everywhere. He's alongside me and we're engaged in a way I never knew was possible."

Jo's story sheds light on the stunning potential for any of us to receive a deepening experience of our baptismal covenant. It is possible to engage theological imagination at the parish level. It is possible that those who yearn to deepen their understanding of faith can be surprised, joyful, and encouraged as they reflect on what God might be up to. It is possible that God is transforming us within every aspect of our lives and within the communities and relationships where we live and move.

Jo's story, and many more that we heard through our research, confirm what we suspected. God is continually inviting all baptized people to lives of meaning and purpose, using their gifts for a greater good. There are wonderful stories of conversion, transformation, and Christian vocation. There are deep relational connections--such as those formed by members of our Task Force--that exist among practitioners and transcend geographic and institutional boundaries. There are rich resources and ancient practices to feed the people of God, but sadly, our institutional structures have not focused on encouraging baptismal formation or deepening relationships among the baptized.

The time is right for the Episcopal Church to dedicate financial resources to better align formation priorities for baptismal living with existing resources through improved churchwide communication and access.

What can the Church do now?

Simply put, the Task Force has oriented our work toward a strategy for a renewed Church in the 21st century, moving from a notion of "church as membership" to "church as the living Body of Christ"; re-orienting from ecclesio-centric ministries to missio-centric practices for parishes and worshiping communities; shifting from the vocation of the professionally trained "few" to the vocation of the locally trained "all"; turning from simply worshipping on Sunday (what I do) to bearing witness to the gospel 24/7 (who I am); and, growing from baptism as a mere social event that confers redemption to baptism that obliges the church to engage every citizen of God's reign in life-long formation.

It is time for the Episcopal Church to "walk its talk" on baptismal theology.

- General Convention must authorize the establishment of a Standing Commission on Formation and Ministry Development as an outward and visible sign of our commitment to the ongoing work of making baptized disciples who make disciples for God's mission in the world.
- Churchwide digital access is needed to existing resources and practices for baptismal ministry in daily life, and to establish systems of mutual accountability for congregations, Commissions on Ministry, theological education programs and seminaries. It is time to expect more of our local congregations as faith-forming communities.
- We have participated in the development of A Christian Life of Faith: Signs and Thresholds Along The Way, and now commend it to the Church as a roadmap for intentional discipleship in daily life. (See Supplemental Materials)

Why does it matter more than ever?

The raging of dual pandemics-- racism and COVID-19 -- has made our Task Force work more urgent and more relevant. As churches were forced to close their buildings, scramble online, and re-imagine ministry, congregations were challenged to define what it means to be a faithful Christian and an active Episcopalian. As infection and death rates soared, quarantine and isolation prevented regular contact with people we love, social distancing and mask wearing became essential life-saving acts, and people found themselves immersed in racial reckoning. Suddenly, what we renounce and what we affirm at baptism has taken on new significance.

The focus of the work of God's people did not change with the onset of the COVID-19 pandemic and the urgent struggle against racism, white supremacy, and anti-Black bias. In fact, the work of love and justice became all the more pressing, especially as the pandemic disproportionately devastated Black, brown, and indigenous communities. If baptism is our response to God's invitation to life, then our "yes" is embodied within each of us, shaping and forming us in The Way of Love, ordering and re-ordering our lives, and binding us to the truth that all are born of the one God and deserving of respect.

Our Task Force has been charged with developing resources for "building up the church." The most important resource for that renewal is the commitment by each congregation, lay person, deacon, priest, and bishop to activate baptism. We can choose to live as if we actually believe "the church carries out its ministry by the ministry of [ALL of] its members" (BCP 855), recognizing our membership is born at the font. Our covenant holds us--and you, our siblings in Christ--accountable to making and living that stunning, egalitarian promise.

How did we come to these conclusions?

Our Task Force was very active and established strong, sustaining relationships with one another as we conducted our work. We met in person twice: March 20-22, 2019 at the Hyatt Regency, O'Hare, Chicago, and October 1-3, 2019 at Virginia Seminary. In between and through 2020, the Task Force met most months via Zoom, with two active working groups: Resources, and Theological Foundation & Contextual Rationale.

In addition, Task Force members leveraged our relationships across the Church and collaborated with formation networks and bodies including Forma, the General Convention Task Force on Theological Networking, Commissions on Ministry, Living Stones/Total Ministry, and Baptized for Life. Two members served on the development team for A Christian Life of Faith: Signs and Thresholds Along the Way, a resource to guide lifelong faith and ministry development for baptized Episcopalians (see Resolution ___ below). One member participated in the creation of materials for the Embracing Evangelism series. Each Task Force member served as an ethnographer, gathering descriptive data on the condition of formation for baptismal ministry in their ministry context. Given that our membership includes all orders of ministry, members who range in age from mid-thirties to mid-seventies, and individuals resident in seven Provinces, we represent the broad Church. These objective demographic realities, added to our lived experience of race, class, ethnicity, gender, sexual orientation, and theology guaranteed passionate discussions in our meetings!

What's Next, January 2020 - July 2022

While our official status as a Task Force ends with the submission of this report, members have committed themselves to continue the work begun here in preparation for General Convention 2022. We look forward to being available to work with members of the GC Committees to which our Resolutions are assigned, thus laying a foundation for the resolutions offered here.

To the extent our time allows, we will be working to:

Promote connection and resource exchange among existing initiatives and networks that prioritize baptismal theology (as described in our foundational principles) in order to build momentum toward improved coordination and impact. Examples include:

Embracing Evangelism[(1)]
Becoming Beloved Community[(2)]
Way of Love[(3)]
Baptized for Life[(4)]
Total Ministry for Today's Missional Church[(5)]
Journey to Baptismal Living[(6)]
Forma[(7)]
Select Commissions on Ministry

Promote examples of existing resources and proven practices for forming baptismal ministry as the calling of every baptized member. In particular, tools for gifts discernment and selection of contextually-appropriate curriculum will be elevated. Two excellent examples:

A Christian Life of Faith: Signs and Thresholds Along the Way[(8)]
How to choose a curriculum?[(9)]

Our research (survey, interviews, resource mapping) revealed THREE TASKS OF A THRIVING CHURCH

1. Discern - ongoing support for all the baptized to identify their gifts for ministry
2. Practice - resources and opportunities to equip the baptized to employ their gifts for ministry
3. Accompany - affirm and support the baptized for the full engagement of ministry in daily life

The following affirmation and resolutions are crafted toward a vision of thriving congregations that fulfill these tasks such that all baptized persons are encouraged to discern their gifts for ministry and exercise them with confidence.

End Notes

(1) https://episcopalchurch.org/embracing-evangelism/series

(2) https://episcopalchurch.org/beloved-community

(3) https://episcopalchurch.org/way-of-love

(4) https://baptizedforlife.org/

(5) https://www.facebook.com/groups/931342414039535

(6) https://journeytobaptism.org/

(7) https://www.forma.church/

(8) https://drive.google.com/file/d/1eNoyGd_F20zst2LpQQB2nL6aycKyj4xD/view

(9) https://buildfaith.org/choosing-curriculum/

Affirmation of Resolution to Establish a Standing Commission on Formation and Ministry Development

We strongly support Resolution A037 submitted to the 80th General Convention by the Standing Commission on Structure, Governance, Constitution and Canons to amend Canon I.1.2.n to Establish a Standing Commission on Formation and Ministry Development.

"A Standing Commission on Formation and Ministry Development. The Commission shall coordinate and encourage the development of all orders of ministry, encouraging and engaging all the baptized in the work of building up the church and developing best practices to ensure all churches benefit from the diversity of leadership gifts God has given us."

EXPLANATION

Restoring a single Standing Commission to focus on ministry and formation would sustain the significant work that is needed in areas of Title III as they impact the 99.2% of the Episcopal Church that is not ordained. It would demonstrate the Church's commitment to its baptismal theology and its accountability for the ongoing formation of Christian disciples across the life course, by prioritizing resources and offering structural oversight.

Proposed resolutions

A103 Describing a Christian Life of Faith in the Episcopal Tradition

Resolved, the House of ___________ concurring, That the 80th General Convention commend to each diocese A Christian Life of Faith: Signs and Thresholds Along The Way as a discernment tool and formation guide for baptized Episcopalians, directing it particularly to Commissions on Ministry as a resource to fulfill Title III: Canon 1: Of the Ministry of All Baptized Persons which states, "Each Diocese shall make provision for the affirmation and development of the ministry of all baptized persons"; and be it further

Resolved, that Executive Council appoint a liaison to the "Christian Life of Faith" writing group for the purposes of regular communication and mutual accountability.

EXPLANATION

A Christian Life of Faith: Signs and Thresholds Along The Way is designed to encourage and engage all the baptized in the work of building up the church by identifying their gifts for ministry, employing their gifts for ministry, and focusing on full engagement of their ministries in daily life, work, and leisure. Fortunately, there are recognizable signs of maturing in our relationship with God. They are marks of our deepening knowledge and understanding, the shaping of our values and attitudes, as well as the honing of our practices and skills. As we more fully embrace our identity as disciples and members of the Body of Christ, there also are thresholds that we can cross — Claiming, Engaging, Sustaining, and Cultivating / Catalyzing. Each threshold marks accepting increased responsibility to proclaim God's loving, liberating, life-giving Good News (evangelism) and to help others to find their paths as we pass on our faith (faith formation).

The document identifies these signs and thresholds as markers of maturation during a faith-filled journey. The first part of the document is primarily for individuals who may want to wonder, widen, and deepen their understanding of themselves and of God. For these individuals, the signs and thresholds are a type of discernment or self-assessment tool to prompt reflection upon where they are in their personal faith and ministry development. The hope is that individuals will find descriptions that affirm their strengths and capacities, as well as indicate areas where they may want to stretch and search for resources that enhance spiritual growth and leadership.

The second part of the document is primarily intended for those responsible for passing on the teachings of the church (Commissions on Ministry, faith formation leaders, spiritual directors, clergy, vestry members, chaplains, diocesan directors, etc.). This section compiles the signs and thresholds into a grid for comparison across thresholds. The grid is designed to help facilitators, companions, and/or teachers to see the scope and sequence of how the stages relate and guide their adaptation of educational and formational resources for local contexts. The hope is that the signs and thresholds will promote deeper faith and ministry development in a congregation, intentional community, or diocese as, together, we move ever closer to the dream of God.

A104 Creation of a Digital Hub for Formation Resources (in English, Spanish, and French)

Resolved, the House of ___________ concurring, That the 80th General Convention instruct Executive Council to implement the recommendations of the Task Force on Formation and Ministry of the Baptized and the Task Force on Theological Networking to develop a plan for a sustainable digital hub for Episcopalians to access formation resources for lay and ordained vocations; and be it further

Resolved, that Executive Council present a report with the plan (to include recommended structure, content, staffing, timeline, and budget) to the 81st General Convention; and be it further

Resolved, that $30,000 be budgeted for the work of developing this plan over the next triennium.

EXPLANATION

Most church-wide funding for formation is currently committed to the discernment, preparation and practice of ordained ministry, while 99.2% of our Church is baptized lay members. The most recent projections of Episcopal Church membership are dire. No amount of restructuring or reimagining local ministry will grow a vibrant church without a consistent commitment to lifelong Christian formation, the making of disciples who make disciples.

As our research over this past triennium has demonstrated, the Episcopal Church is blessed with formation resources (curriculum and proven practices), gifted Christian educators, writers, artists, videographers, publishers, and networks dedicated to formation, evangelism, discipleship, camps and conference ministries, chaplaincies and more, but, tragically, efforts are siloed. Local congregations are often unaware of all that is available, have difficulty accessing quality resources for their context, and/or do not have clergy or lay leaders trained to teach the faith well.

There is an urgent need for easily accessed, open source formation resources from discernment practices through preparation for ministry in daily life, including ordination. As a denomination, we must move from a free market system of resource distribution toward a collaborative clearinghouse that curates and promotes theologically and pedagogically robust resources for use in diverse cultural contexts. We need a denominational portal for individuals, congregations, schools, chaplaincies and camps, Commissions on Ministry, seminaries, diocesan schools, and Episcopal leaders to access resources to grow faith and live our baptismal theology with confidence.

Such an undertaking is ambitious and requires leadership at the church-wide level to emphasize the urgency, increase visibility, and establish accountability. The Anglican Communion has set a good example with its Season of Intentional Discipleship (https://www.anglicancommunion.org/mission/intentional-discipleship.aspx).

Other denominations in the U.S. have made similar commitments, for example the United Methodist Church (UMC)'s e-learning discipleship platform https://discipleship-ministries.teachable.com/ and ResourceUMC, the online destination for Methodist leaders https://www.resourceumc.org/.

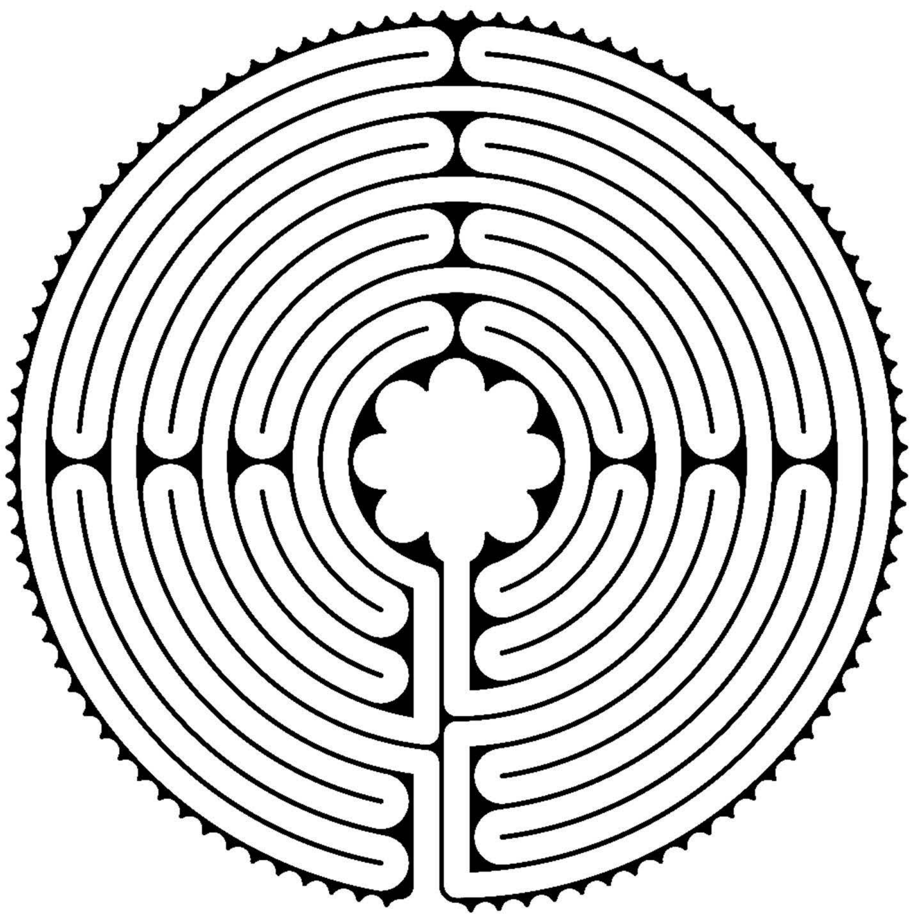
Continuance recommendation

It is essential that a General Convention-appointed, church-wide body continue to dedicate itself to the Formation and Ministry of the Baptized. Rather than recommend a continuance of this Task Force we enthusiastically support the Resolution from the Standing Commission on Structure, Governance, Constitution and Canons to amend Canon I.1.2.n to Establish a Standing Commission on Formation and Ministry Development. In the event such a Standing Commission is not established, we recommend continuance of this Task Force.

Supplemental Materials

Table of contents:

A Christian Life of Faith:
Signs and Thresholds along The Way



I AM
A BAPTIZED CHRISTIAN
WHO WONDERS…
How can I participate in and practice a Christian life of faith as a baptized Episcopalian, conforming to Christ's way of life and continually being transformed on my lifelong journey of faith?

FOLLOWING *THE WAY*

A Christian life of faith is premised on being in relationship with God and with God's people. We have assurances from those who have come before us that God wants us to have life and have it in abundance. We claim this fullness of life as we travel with God on a journey that has three dimensions:

- ***It is lifelong***—unfolding chronologically across one's life;
- ***It is life-wide***—integrating formative events and experiences from across one's contexts; and
- ***It is life-deep***—making meaning influenced by culture, beliefs, attitudes, emotions, ideologies and values.

As we meander through life's labyrinth, individually and in community, we gain insights and make connections between and across our experiences of faith in the church and in the world. Through them we glean a glimpse of the dream God offers. Sometimes the path to reach it is clear; other times it seems illusive. Fortunately for those of us who want help navigating our way, there are recognizable signs of maturing in our relationship with God. They are marks of our deepening knowledge and understanding, the shaping of our values and attitudes, as well as the honing of our practices and skills. As we more fully embrace our identity as disciples and members of the Body of Christ, there also are thresholds that we can cross. These steps mark accepting increased responsibility to proclaim God's loving, liberating, life-giving Good News (evangelism) and to help others to find their path as we pass on our faith (faith formation).

This document is our attempt to identify the signs and thresholds of a faith-filled journey. It is designed in two parts which reflect the ways two groups likely will use it. Both parts of this booklet include the same signs and thresholds; the signs and thresholds are just presented differently. The first part is primarily for individuals who may want to wonder, widen, and deepen their understanding of themselves and of God. For them, the signs and thresholds are a type of discernment or self-assessment tool to prompt reflection upon where they are in their personal faith and ministry development. This section identifies four thresholds—Claiming, Engaging, Sustaining, and Cultivating/ Catalyzing—and uses each "stage" or "phase" to organize the typical focus, questions, and signs of someone in this space. The hope is that individuals using this part will find descriptions that resonate and affirm their strengths and capacities as well as indicate areas where they may want to stretch and search for resources that enhance spiritual growth and leadership. The second part is primarily intended for those responsible for passing on the teachings of the church (such as Vestry members, Commissions on Ministry, faith formation leaders, spiritual directors, clergy, chaplains, diocesan directors, etc.). This section compiles the signs and thresholds into a grid for comparison across thresholds. This design should help facilitators, companions, and/or teachers to see the scope and sequence of how the stages relate and guide their adaptation of educational and formational resources for local contexts. The hope is that the signs and thresholds promote deeper faith and ministry development in a congregation, intentional community, or diocese. Regardless of the form you use, we hope you find it useful.

The seeds of this document were planted in the summer of 2019 when colleagues in faith formation and ministry development circles embraced God's invitation and committed to produce this guide. It is our gift to the church. Recognizing that it is only a starting point, we want (and need) to hear your reactions to it, especially as you use it in your context. Tell us what is missing and how can it be improved and refined. Send your feedback and recommendations to Julie Lytle at jlytle@bexleyseabury.edu. We offer our thanks and blessings for your journey!

Ellen Bruckner, Kate Gillooly, Lisa Kimball, Julie Lytle, Deborah Bressoud Parker, Sharon Ely Pearson, Tina Pickering, Melissa Rau, Amy Cook, Vicki Garvey, Alexizendria Link, James McKim (November 18, 2020)

GUIDELINES FOR USING PART I AND PART II

While linear in its presentation and format, we caution against a prescriptive use of these signs and thresholds. The way in which each of us grows in our relationship with God and lives a Christian life of faith is unique. Some of us travel more direct paths while others take a more circuitous path. To avoid the potential slip to use these signs and thresholds for assessment, we offer these **guidelines of use** to the different groups that may want to use them:

General guidelines for individuals and groups:

- Much like walking a labyrinth, a life of faith is full of twists and turns.
- Enter the discernment from any of the sections. There is no prescribed order or direction.
- Take your time.
- Read each description.
- Celebrate strengths and embrace areas of growth.
- Reflect upon what the signs say about personal faith and ministry possibilities.
- Allow space for silence.
- Listen for what God is up to and where nudges are being felt.
- Journaling may be helpful.
- Talking with a spiritual director or trusted friend may be helpful.
- Recognize and celebrate a current path; consider future directions.
- Consider the questions as guides for reflection, not as assignments to complete.
- Remember, this is intended as a support, not a burden.

For **LOCAL CONGREGATIONS** guiding personal and communal discernment:

- Local discernment teams might use these signs and thresholds as well as the discernment questions with anyone in the congregation who may be interested in life direction.
- Search committees might incorporate discernment questions into their interview times.
- Some of the questions might be helpful in Identifying lay leaders in a congregation.
- Vestries/Bishop's committees might find the signs and thresholds useful as they help to identify those who may be called to ordained ministry.

For **COMMISSIONS ON MINISTRY** guiding personal discernment:

- Grid and discernment questions might be helpful in interviews.
- COM liaisons might use discernment questions with persons in the process toward ordination.
- COMs might find this useful in their work as advisors on lay ministries throughout the diocese.

PART I: SIGNS & THRESHOLDS FOR INDIVIDUALS

This document is for individuals who want to wonder, widen, and deepen your understanding of yourself and of God. You are encouraged to use these pages to identify where you feel confident and capable as well as where you feel unsure. The four thresholds—Claiming, Engaging, Sustaining, and Cultivating/Catalyzing—are offered as indicators of a maturing Christian life. They are designed to prompt reflection upon where you are in your personal faith and ministry development and suggest the knowledge, skills, and practices needed to follow Jesus at significant points in a faith journey. Together, the signs and thresholds are intended as a tool to aid discernment or self-assessment and are not an inventory for evaluation or judgment. Instead, the thresholds are simply containers that you use to get a sense of where you may be and where you may want to explore during your faith journey. The format for each of the thresholds is the same; they start with a brief description of typical characteristics of someone at this point in their faith journey and then list signs that we hope they can confidently express within the faith community and in the world. We encourage you to read each description, reflect upon what the signs say about your personal faith and ministry development, recognize your strengths, and identify where you want to grow. They are offered with blessings for the journey.

THRESHOLD I: CLAIMING

I have been baptized and am beginning to claim a new faith as I come to know God's Story

Characteristics: curious, seeks understanding, desires affiliation and sense of belonging

Focus: Energies, primarily self-introspective, to gain grounding and become rooted in a new faith

- Who am I as a Christian?
- How do I hear and discover what being a Christian means for me?
- How do I hear and discover what being an Episcopalian means for me?

Pedagogical Stage: BLOOM's TAXONOMY: Remembering, Understanding

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Hear and claim the Christian Story as my own.
- Know that the Bible is the foundational text of the Christian faith.

Episcopal Tradition

- Recognize that the Episcopal way values scripture, tradition, and reason as its foundation.
- Understand Episcopal identity as defined by the Book of Common Prayer (BCP), the liturgical calendar, and particularly the Baptismal Covenant.
- Participate in my faith community.
- Recognize the various roles that help make a faith community.
- Learn to pray as a means of being in relationship with God.
- Try worshipful experiences.

Theology

- Claim my belovedness in God.
- Appreciate the limits of my humanity and welcome the grace that God offers.
- Understand that baptism is the beginning of a journey, confirmation involves a personal decision to continue that journey, and the journey changes with life and as one's faith matures.
- Recognizes that Theology is the systematic study of human experience of God.
- Aware that the Baptismal Covenant, Book of Common Prayer, and scripture are foundational sources of inspiration and formation.

Representing Christ

- Wonder about the meaning of life.
- Recognize my gifts given to me by God.
- Question who I am.
- Desire a relationship with God.
- Understand prayer as a spiritual conversation.
- Seek others to share spiritual conversations.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Recognize scripture and God's story in the world.
- Hear how others make connections between My Story and God's Story.
- Curious about how scripture speaks to current circumstances and global concerns.

Episcopal Tradition

- Recognize holiness in life's patterns, practices, and rituals.
- Identify the patterns, practices and rituals that inform my living as a faithful and ethical person.
- Learn about how the Episcopal church responds to issues of social justice and stewardship.

Theology

- Recognize and explore the interrelationship between faith and other disciplines.
- Wonder how God is incarnate in all of life's big questions and the world's great challenges.
- Acknowledge the existence of evil.
- Explore turning to God in times of challenge and uncertainty.

Representing Christ

- See God in all people.
- See the world through the life and teachings of Jesus.
- Think differently about decision-making because of my faith.
- Listen and participate respectfully when various perspectives are presented respectfully.
- Recognize responsibility to vulnerable people and places.

THRESHOLD II: A STORY OF ENGAGING

I meet others who know God's Story and engage with them in communion.

Characteristics: seeking, connecting, exploring

Focus: Energies primarily oriented to engaging in community

- What gifts do I bring to the community?
- What value do I add? How/What am I contributing?
- How do my relationships help me understand God more fully?

Pedagogical Stage: BLOOM'S TAXONOMY: Applying

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Find self in the Christian Story (biblical and beyond).
- Familiar with the foundational Scriptural stories that form the story of Salvation.

Episcopal Tradition

- Appropriate scripture, tradition, and reason (with experience) to inform life and use as the basis of my theological reflection.
- Identify as an Episcopalian which includes familiarity with the Baptism, Eucharist, sacramental rites, creeds, and Book of Common Prayer (BCP).
- Understand Episcopal polity, its historic relationship with the Anglican Communion and the relation of parish, diocesan, provincial and church-wide structures.
- Understand the nature of ministry and honor different roles within the whole Body of Christ and recognize connections between church history, liturgy, ethics and social action.
- Commit to a discipline of corporate and individual prayer and worship.
- Understand the history and practice of Episcopal worship.

Theology

- Practice ways of helping others recognize and claim their belovedness.
- Confront sin in myself and in the world and recognize the power of forgiveness.
- Understand and value being a member of the body of Christ.
- Deepen relationship with God through critical engagement with scripture and traditions of Christian thought.
- The Baptismal Covenant and the Book of Common Prayer, and scripture inform my life/worldview.

Representing Christ

- Recognize the joys and obligations of Christian commitment.
- Appreciate the gifts of others.
- Engage in ongoing self-reflection about difference to understand historical inequities and suffering caused by religion and indifference.
- Participate in spiritual growth opportunities in my faith community.
- Participate in community worship, and miss it when I am absent
- Develop important relationships in my faith community.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Hear God’s Story from multiple perspectives.
- Articulate how to Integrate God’s Story in my life.
- Embrace the Biblical imperatives to love God and to love our neighbors as ourselves.

Episcopal Tradition

- Understand the rituals of my faith tradition as part of larger interfaith/global tradition.
- Articulate what I believe about my faith with others & what distinguishes it from other faith traditions/ denominations.
- Understand that the Episcopal Church and the Anglican Communion give public witness to contemporary challenges.

Theology

- Commit to loving God and my neighbor.
- See God’s radical love in everyday life.
- Recognize my responsibility for all of God’s creation.
- Acknowledge the imperative to join God’s Mission for the world.

Representing Christ

- Strive to love others regardless of our differences or perceived differences.
- Engage my neighbor in response to my faith.
- Apply my faith when addressing issues.
- Participate in conversations that raise spiritual questions with people who do not share my faith tradition.
- Participate with my church to address needs in my community.

THRESHOLD III: A STORY OF SUSTAINING

I "wrestle" with God and God's Story and share my gifts to sustain my community and God's Mission

Characteristics: committed, consistent, confident, capable, competent, healthy questioning

Focus: Commitment to faith community – locally and/or church-wide

- What helps me go deeper?
- How can/do I deepen my faith?
- What feeds me?
- Who are my models and inspiration?

Pedagogical Stage: BLOOM'S TAXONOMY: Analyzing

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Explore my personal story, my faith community's story and my wider community's story in light of the Christian Story to make decisions.
- Study scripture with a working knowledge of how to interpret and use scripture in a range of different contexts.
- Lead Bible reflection confidently with a studied approach.

Episcopal Tradition

- Articulate the impact of personal faith (Apostles' Creed), the faith of the church (Nicene Creed), and ethical questions.
- Regularly participate in and practice my faith with others an Episcopal context.
- Exercise authority to engage resources and structures of The Episcopal Church (TEC).
- Actively engage in ministerial roles in my community and missional networks beyond the local level.
- Confidently pray and talk about prayer with others.
- Actively participate in Episcopal Worship as participant and leader.

Theology

- Theologically reflect upon the structure/systems that limit our embrace of our Belovedness in God.
- Adapt my actions to honor difference (diversity) with and among cultural and religious groups.

- Articulate my sense of vocation and be able to navigate possible tension between the personal and ecclesial aspects of ministry.
- Understand the ways in which Christian beliefs and practices have developed over time and are developing in varying contexts.
- Discuss the theology of the Baptismal Covenant, the BCP and scripture and their implications for personal and corporate decision-making with others.

Representing Christ

- Live by a Rule of Life.
- Share my gifts in my faith community.
- Risk asking tough questions of my faith community at any level, especially to acknowledge difference and dismantle oppression.
- Participate in a community of practice and/or seek spiritual direction (enrichment) from a director, faith mentor or leader of faith.
- Embrace liturgical roles and lead worship.
- Embrace leadership roles within my faith community.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Make decisions informed by God's Story.
- Share the Good News utilizing theologically sound resources for biblical literacy.
- Reflect theologically on specific scriptural passages and different interpretations to choose how I respond to current events and global concerns.

Episcopal Tradition

- Participate in rituals inspired by my faith in my public community.
- Engage in dialogue about faithful living with others from different denominations/faiths.
- Represent my denomination in civic and interfaith circles.

Theology

- Point to and name God's action in the world.
- Join God in action in the world as a follower of Christ.
- Discuss the things I see as evil in my world with others.
- Engage in deeper reflections of God's mission and our role in that mission with other communities.

Representing Christ

- Intentionally seek the face of Christ in others.
- Admit my faults and seek forgiveness; I forgive.
- Strive for justice and peace as a witness of my faith.
- Connect my actions to God's mission of love, liberation and life for all of creation.
- Share my time, talent, and financial resources sacrificially.

THRESHOLD IV: A STORY OF CULTIVATING-CATALYZING

I help others "wrestle" with God and God's Story cultivating their faith and catalyzing their engagement in God's Mission.

Characteristics: confident in leading, called & calling, capacity building, courageous, co-create

Focus: Cultivate OTHER's maturing in faith and catalyze their engagement in God's Mission

- How am I called to companion others?
- How can I invite others into discipleship?
- How can/do I pass on faith to others?
- How do I spark other's engagement in God's Mission?

Pedagogical Stage: BLOOM'S TAXONOMY: Evaluating, Creating

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Facilitate others' exploration of the connections between our Individual Stories, our collective stories, and God's Story from multiple perspectives.
- Teach others how to engage theological resources for personal and communal reflection and response.

Episcopal Tradition

- Lead opportunities to learn about the Episcopal Way and its foundational elements and their role in life choices.
- Lead the development and implementation of ideas/ programming to incorporate growth, reflection, and continued practice that leads to deepening of Episcopal Identities.

- Encourage ministry collaborations that utilize the gifts of the laity in partnership with deacons, priests and bishops.
- Guide others' discernment of ways to use their gifts in the faith community.
- Assist others with their prayer life.
- Train liturgical leaders.

Theology

- Create opportunities to restore unity with God and others in Christ and develop processes/practices to dismantle barriers for individuals and community members to claim their belovedness in God.
- Teach the community to understand sin and grace.
- Call my faith community to deeper reflection on its role in God's Mission and mentor others in recognizing God's invitation to them as members of the Body of Christ.
- Create opportunities for community members to critically engage and systematically study our human experience of God and deepen our relationship with God.
- Teach the interconnections of history, theology, and moral decision-making based in Scripture, the Baptismal Covenant, the Book of Common Prayer.

Representing Christ

- Equip others for their discernment and gifts appreciation.
- Recognize and cultivate the gift/s of others.
- Seek ways to empower my faith community to understand historical inequities and suffering caused by religion and indifference.
- Invite and inspire others to claim their place in God's Mission.
- Prepare members for participation and leadership in worship.
- Prepare others for leadership roles.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Share the Christian Story while equipping others' learning and questioning.
- Equip others to share God's story in a variety of ways.
- Lead communal reflections on contemporary circumstances, issues and concerns, and facilitates communal responses to them.

Episcopal Tradition

- Create and lead rituals inspired by my faith in my public community.
- Create environments where life's questions can be engaged in faith-filled ways from lots of perspectives.
- Host gracious and brave conversations with guidelines for sharing that honor all perspectives.

Theology

- Teach others how to listen to voices from the margins and develop justice-seeking responses that address systemic injustice.
- Embrace diversities with and among cultural and religious groups.
- Risk asking and leading dialogue of unspoken questions.
- Facilitate the creation of opportunities to join God's Mission with others.

Representing Christ

- Inspire others to right relationships with God, self, others and all creation.
- Create space for healing and reconciling.
- Seek ways to empower my wider community to understand historical inequities and suffering caused by religion and indifference.
- Engage in ongoing collaboration with the wider community to speak truth to power.
- Monitor coherence between what I/we say and what I/we do.

PART II: SIGNS & THRESHOLDS FOR THOSE RESPONSIBLE FOR PASSING ON THE TEACHINGS OF THE CHURCH

PREAMBLE: Lifelong, Life-wide, and Life-deep Faith and Ministry Development for all Baptized Episcopalians[1]

In the Episcopal Church, the **Baptismal Covenant** articulates the relationship God establishes with us in Holy Baptism and defines who we are as Christians and Episcopalians. It offers questions that explore how we know God: Creator, Redeemer, and Sanctifier (Father, Son, and Holy Spirit). It also highlights the work God has given us to do:

- to continue in the apostles' teaching and fellowship, in the breaking of the bread, and in the prayers;
- to resist evil and repent when we fall into sin;
- to proclaim the Good News of God in Christ through word and example;
- to seek and serve Christ in all people; and
- to strive for justice and peace and respect the dignity of every human being.2

How we each experience God, grow in faith, and discern our response to God's invitation is unique. What we share—sometimes more individually and sometimes more collectively—is a **lifelong, life-wide, and life-deep**[3] journey through which we develop the skills to respond to God's invitation to be the body of Christ both within our faith communities and within the world.

This document is primarily intended for members of a faith community at the local or diocesan level (such as Vestry members, Commissions on Ministry, faith formation leaders, spiritual directors, clergy, chaplains, and those responsible for passing on the teachings of the church, etc.) **who serve formally or informally as catalyzers and cultivators of other adults' faith journeys**. The document is designed to help these facilitators, guides, and/or teachers to adapt resources to local contexts in order to promote deeper faith and ministry development in a congregation, intentional community, or diocese. It is created to be a resource to generate opportunities for fellow travelers to wonder, widen, and deepen their understanding of themselves and of God as well as to gain confidence in their grasp of the

[1] This document was developed by a working group with guidance from the Task Force for Faith Formation and Ministry of the Baptized. Writing Team members include Ellen Bruckner, Kate Gillooly, Lisa Kimball, Julie Lytle, Deborah Bressoud Parker, Sharon Ely Pearson, Tina Pickering, and Melissa Rau with additional support from Amy Cook, Vicki Garvey, Alexizendria Link, and James McKim.

[2] The Book of Common Prayer, pp 304–305.

[3] Lifelong reminds that a journey of faith unfolds chronologically across one's life. Life-wide reminds that a journey of faith integrates formative events and experiences from across one's contexts. Life-deep reminds that the meaning-making that occurs while on a journey of is influenced by culture, beliefs, attitudes, emotions, ideologies and values.

knowledge, skills, and practices needed to follow Jesus. This is not meant to be a static document but flexible; local leadership is encouraged to adapt and adjust to fit their own contexts and needs.

While designed primarily for catalyzers and cultivators of faith, it is important to be clear—faith and ministry development are the work of *all baptized people*, not just those who may consider themselves leaders or potential leaders in the church. All baptized Christians are ministers and are called to join God's mission both in the church and in the world. Thus, individuals also may use this document as a discernment or self-assessment tool (See Part I of this document) to reflect upon where they are in their personal faith and ministry development – recognizing strengths and prompting the search for additional resources for growth in spirituality and leadership. While linear in its presentation and format, it can also be visualized as a labyrinth, entering at a certain point and following a path that has twists and turns, with new perspectives gained along the way.

To that end, this document is offered as both a **map and a set of map-making elements**. As a map, without presuming a particular entry point or sequence,[4] the document attempts to identify recognizable signs and thresholds of one's faith journey through a four-phased continuum. The continuum encompasses recognizable signs of maturing in our relationship with God that mark deepening knowledge and understanding, the shaping of values and attitudes, as well as the honing of practices and skills. There are also thresholds to cross as an identity as disciples and members of the Body of Christ is more fully embraced. Decisions are then made to accept increased responsibility to proclaim God's loving, liberating, life-giving Good News (evangelism) and to help others to find their path as we pass on our faith (faith formation). These threshold crossings can be described as "movements" between four "stages" which are experienced differently by each person:[5]

- **Claiming—starting to grow in Christian faith as an Episcopal expression;**
- **Emerging—deepening individual faith through connection to a community of faith;**
- **Sustaining—engaging in faithful service, consistent spiritual practices, and participation in various aspects of life and leadership within the church and within the world; and**
- **Cultivating and Catalyzing—inspiring, supporting and passing on the faith to others on their lifelong faith journey.**5

[4] New, as well as "established" Christians may find themselves traversing these thresholds during their faith journey. For example, one may be well versed in scripture (Sustaining), but lack an Episcopal lens for reading and theological reflection (Emerging). Some may be following a call to serve in the community (Cultivating/Catalyzing) long before connecting their ministry to their faith (Claiming, Emerging).

[5] In 1956, Benjamin Bloom and four collaborators published a framework for categorizing educational goals using a cognitive progression which presumes lower order thinking is necessary to the development of higher order thinking, familiarly known as Bloom's Taxonomy. It was revised as Bloom's Revised Taxonomy (BRT) in 2001. The writing team used BRT and its six levels to differentiate learning outcomes in each of the four phases: Claiming includes the BRT's remembering and understanding; Emerging concentrates on BRT's applying; Sustaining focuses on BRT's analyzing and evaluating; and Cultivating/Catalyzing highlights BRT's creating.

As a set of **map-making elements** (the significant sites, potential routes, and legends for interpretation), this document highlights four areas that capture the breadth of what it means to follow Jesus within an Episcopal context:

- **Scripture,**
- **Episcopal Tradition** (including history and liturgy),
- **Theology**, and
- **Representing Christ** (including ethics and moral theology).

Together, these elements chart demonstrable competencies we express as we follow the call to discipleship more fully. They also provide a critical foundation for consistently engaging in practices of reconciliation—confronting sins that limit human dignity such as racism, sexism, ableism, and clericalism.

The authors of this document understand "competencies" as active elements that demonstrate we are growing and getting better at something throughout the course of our lives—that we are living as disciples. Beyond a transcript that outlines content with which we have engaged, competencies also describe attitudes and practices we claim as we grow through phases of faith and ministry development. We like to think of **competencies as** "**confidences—feelings or consciousness of one's powers.**" Each time we deepen our knowledge, sharpen our skills, embrace Christ-like attitudes and respond in faith, we show how we are gaining confidence as we strive to follow Jesus more nearly, deepen our relationship with God, and respond to God's presence in our lives.

Background of this Document

The Anglican Primates initiated the creation of similar maps and map-making elements in 2003 when they established a task force on Theological Education for the Anglican Communion (TEAC). TEAC's aim is to help all Anglican Christians to be theologically alert and sensitive to the call of God. TEAC focused on an "Outcomes Based" model for education and encouraged a shift from "What does a person know?" to "What competencies does the learner need to gain in order to be able to fulfil this or that task/job/vocation?"[6] *TEAC offered a set of "ministry grids" for bishops, priests, deacons, licensed lay ministers, and lay people with the hope that each of the Anglican Communion Provinces would adapt them for local use. Within the Episcopal Church, the Association for Episcopal Deacons published competencies for diaconal formation in 2017 and updated them in 2018. The writing group offers this document,* ***A Christian Life of Faith: Signs and Thresholds along The Way,*** *for your use and adaptation*.[7]

[6] TEAC offers more information about the philosophy of 'Outcomes Based' education as it applies in the context of South Africa here: https://www.anglicannews.org/news/2006/01/teac-meeting-ends-with-pledge-to-help-renew-theological-education.aspx.Theological Education for the Anglican Communion (TEAC), https://www.anglicancommunion.org/theology/theological-education/ministry-grids.aspx, January 5. 2020.

[7] Please comment! Does this document appropriately and adequately capture the knowledge, attitudes and skills of all the baptized as we grow in faith and develop our ministries. Send comments to jlytle@bexleyseabury.edu.

A CHRISTIAN LIFE OF FAITH: SIGNS AND THRESHOLDS ALONG *THE WAY*

I am a baptized Christian who wonders what my journey of faith is in relationship with God, myself, my neighbor, and all of creation.

Living my faith within the faith community asks "How am I growing in faith within an expanding circle of believers?" The focus is ***formation.***

Living my faith in the world asks "How am I sharing my faith beyond my faith community? The focus is ***evangelization.***

THRESHOLDS	**CLAIMING** *I have been baptized and am beginning to claim a new faith as I come to know God's Story.*	**ENGAGING** *I meet others who know God's Story and engage with them in communion.*	**SUSTAINING** *I "wrestle" with God and God's Story and share my gifts to sustain my community and God's Mission.*	**CULTIVATING-CATALYZING** *I help others "wrestle" with God and God's Story cultivating their faith and catalyzing their engagement in God's Mission.*
Characteristics	**SELF-CONSCIOUS as beginning a Christian Life of Faith** curious, seeks understanding, desires affiliation and belonging *(BLOOM: remembering, Understanding*)	**BECOMING ACTIVE in a faith community and Engaging Faith** seeking, connecting, exploring *(BLOOM: Applying)*	**FAITHFUL SERVICE IN THE CHURCH locally and/or church-wide** committed, consistent, confident, capable, healthy questioning *(BLOOM: Analyzing)*	**OTHER-ORIENTED—responsible for teaching and passing on faith** confident in leading, called & calling, capacity building, courageous, co-create *(BLOOM: Evaluating, Creating)*
General Discernment Questions	Who am I as a Christian? How do I hear and discover what being a Christian means for me? How do I hear and discover what being an Episcopalian means for me?	What gifts do I bring to the community? What value do I add? How/What am I contributing? How do my relationships help me understand God more fully?	What helps me go deeper? How can/do I deepen my faith? What feeds me? Who are my models and inspiration?	How am I called to companion others? How can I invite others into discipleship? How can/do I pass on faith to others? What difference can I make?

DESIRED CONFIDENCE—Formation In particular KNOWLEDGE, SKILLS, ATTITUDES, BEHAVIORS				
Discernment Questions about Scripture	How do I understand the Christian story for myself? Where is my comfort level in reading scripture for myself? Tell a story about a time when loving God and loving my neighbor became real.	Where do I find myself in the Christian story? What Bible stories mean the most to me? How do I understand the Salvation story from scripture? How do I make room in my religious thinking for expanding my understanding?	Where do I notice the Christian story affecting my life? How am I using Bible tools for insight and interpretation? How do I use scripture to support/enhance my prayer/meditation experiences?	Where do I notice the Christian story affecting my life? How am I using Bible tools for insight and interpretation? How do I use scripture to support/enhance my prayer/meditation experiences?
Discernment Questions about Theology	How do I experience my baptismal vows in my life? What parts of the Book of Common Prayer do I turn to in prayer and why? How do I understand the creeds? When do I find myself turning to God in prayer and silence?	How do I explain the importance of being part of a faith community? Where am I being drawn to help in caring for creation? How do I understand my own world view? How is faith informing how I see and understand this world view? How have I examined the theological statements I grew up with?	Where do my experiences with forgiveness fit in the scripture story? What kinds of confession do I find most complete and meaningful to me? How do I clarify and stay focused on my call amidst the many demands of my life? What is the examined theology/honor in my life?	Where in my life have I noticed a broadening/deepening of my practices of living with diversity? How have I challenged myself to explore the faith questions that arise in me? In what ways do I engage others in reflecting on their faith? How am I connecting with the Episcopal Church's framework Building Beloved Community?

DESIRED CONFIDENCE—Formation In particular KNOWLEDGE, SKILLS, ATTITUDES, BEHAVIORS				
Discernment Questions about Episcopal Tradition	Why did I choose the Episcopal Church? What is the element of the Episcopal Church that speaks the most to my life?	How is the Episcopal community important in my life? How am I claiming and living out my Episcopal identity?	What are some of the practices I've found helpful in growing my faith? How am I involved in my local faith community? What ways have I found to connect my life in my faith community with engagement in the larger neighborhood and beyond? How does my faith inform my civic life?	In what ways have I mentored others in their faith? How am I a role model to lead others in expressing faith in action? Where have I opened the space for conversation with others? How do I understand my leadership in my local church?
Discernment Questions about Representing Christ	How do I seek and serve Christ in all people, respecting the dignity of every person? How would I describe my relationship with God? What in worship feeds me for the rest of my week? How does my faith inform my decision-making? How does being part of a faith community strengthen my life?	How has being part of a faith community clarified and/or deepened my spiritual life? How does my participation in my faith community strengthen the faith community? How does being part of a faith community strengthen the wider communities? What or where are the ministries I have said "yes" to in my church? Who are the people I'm drawn to help outside of the church? What do I notice about myself when I engage with people who think and believe differently than I do?	How do I experience the space within my faith community for me and others to have doubts? How do I articulate my Rule of Life and how it developed? As I reflect on my participation in my faith community, where do I identify the areas of growth spiritually for myself and for my life in the wider community? What have I experienced as my more difficult areas of forgiveness? How do I experience the alignment of my actions and my beliefs? How do I understand myself as an agent of reconciliation in the world?	How do I make room for compassion and curiosity when others around me express doubts about faith? How do I respond? What methods/tools have I found effective in engaging others in conversations dealing with reconciliation? How has my faith grown as I work to empower others to use their gifts to serve the community? What are the actions I am taking to disrupt systemic racism in our church and the world?

		CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
SCRIPTURE	Signs of Living my faith within the faith community (forming)	Hear and claim the Christian Story as my own.	Find self in the Christian Story (biblical and beyond).	Explore my personal story, my faith community's story and my wider community's story in light of the Christian Story to make decisions.	Facilitate others' exploration of the connections between Our Individual Stories, Our Collective Stories, and God's Story from multiple perspectives.
		Know that the Bible is the foundational text of the Christian faith.	Familiar with the foundational scriptural stories that form the story of Salvation.	Study the Bible with a working knowledge of how to interpret and use scripture in a range of different contexts. Confidently lead Bible reflection with a studied approach.	Teach others how to engage theological resources for personal and communal reflection and response.
		S.1	S.2	S.3	S.4
	Signs of Living my faith in the world (Evangelizing)	Recognize scripture and God's Story in the world.	Hear God's Story from multiple perspective.	Make decisions informed by God's Story.	Share the Christian Story while equipping others' learning and questioning.
		Hear how others make connections between My Story and God's Story.	Articulate how to Integrate God's Story in my life.	Share the Good News utilizing theologically sound resources for biblical literacy.	Equip others to share God's Story in a variety of ways.
		Curious about how scripture speaks to current circumstances and global concerns.	Embraces the Biblical imperatives to love God and to love our neighbors as ourselves.	Reflect theologically on specific scriptural passages and different interpretations to choose how I respond to current events and global concerns.	Leads communal reflections on contemporary circumstances, issues and concerns and facilitates communal responses to them.
		S.5	S.6	S.7	S.8

		CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
	Signs of Living my faith within the faith community (forming)	Recognize that the Episcopal way values scripture, tradition, and reason as its foundation.	Appropriate scripture, tradition, and reason (with experience) to inform life and use as the basis of my theological reflection.	Articulate the impact of personal faith (Apostles' Creed), the faith of the church (Nicene Creed), and ethical questions.	Lead opportunities to learn about the Episcopal Way and its foundational elements and their role in life choices.
		Understand Episcopal identity as defined by the Book of Common Prayer (BCP), the liturgical calendar, and particularly the Baptismal Covenant.	Identify as an Episcopalian which includes familiarity with the Baptism, Eucharist, sacramental rites, creeds, and Book of Common Prayer (BCP).	Regularly participate in and practice my faith with others in an Episcopal context.	Lead the development and implementation of ideas/programming to incorporate growth, reflection, and continued practice that leads to deepening of Episcopal Identities.

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
	Participate in my faith community.	Understand Episcopal polity, its historic relationship with the Anglican Communion, and relation of parish, diocesan, provincial, and church-wide structures.	Exercise authority to engage resources and structures of The Episcopal Church (TEC).	Encourage ministry collaborations that utilize the gifts of the laity in partnership with deacons, priests and bishops.
	Recognize the various roles that help make a faith community.	Understand the nature of ministry, honor different roles within the whole Body of Christ, and recognize connections between church history, liturgy, ethics and social action.	Actively engage in ministerial roles in my community and missional networks beyond the local level.	Guide others' discernment of ways to use their gifts in the faith community.
	Learn to pray as a means of being in relationship with God.	Commit to a discipline of corporate and individual prayer and worship.	Confidently pray and talk about prayer with others.	Assist others with their prayer life.
	Try worshipful experiences.	Understand the history and practice of Episcopal worship.	Actively participate in Episcopal Worship as participant and leader.	Train liturgical leaders.
	ET.1	ET.2	ET.3	ET.4
Signs of Living my faith in the world (Evangelizing)	Recognize holiness in life's patterns, practices, and rituals.	Understand the rituals of my faith tradition as part of larger interfaith/global tradition.	Participate in rituals inspired by my faith in my public community.	Create and lead rituals inspired by my faith in my public community.
	Identify the patterns, practices and rituals that inform my living as a faithful and ethical person.	Articulate what I believe about my faith with others and what distinguishes it from other faith traditions/ denominations.	Engage in dialogue about faithful living with others from different denominations/faiths.	Create environments where life's questions can be engaged in faith-filled ways from lots of perspectives.
	Learn about how the Episcopal church responds to issues of social justice and stewardship.	Understand that the Episcopal Church and the Anglican Communion give public witness to contemporary challenges.	Represent my denomination in civic and interfaith circles.	Host gracious and brave conversations with guidelines for sharing that honor all perspectives.
	ET.5	ET.6	ET.7	ET.8

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith within the faith community (forming)	Claim my belovedness in God.	Practice ways of helping others recognize and claim their belovedness.	Theologically reflect upon the structure/systems that limit our embrace of our Belovedness in God.	Create opportunities to restore unity w/God and others in Christ and develop practices to dismantle barriers for community members to claim their belovedness in God.
	Appreciate the limits of my humanity and welcome the grace that God offers.	Confront sin in myself and in the world and recognize the power of forgiveness.	Adapt my actions to honor difference/diversity with and among cultural and religious groups.	Teach the community to understand sin and grace.
	Understand baptism as a journey beginning, confirmation involves a personal decision to continue onward, and journey changes with life and faith maturity.	Understand and value being a member of the body of Christ.	Articulate my sense of vocation and able to navigate possible tension between the personal and ecclesial aspects of ministry.	Call my faith community to deeper reflection on its role in God's Mission and mentors others in recognizing God's invitation to them as members of the Body of Christ.
	Recognizes that Theology is the systematic study of human experience of God.	Deepen relationship with God through critical engagement with scripture and traditions of Christian thought.	Understand the ways in which Christian beliefs and practices have developed over time and are developing in varying contexts.	Create opportunities for community members to critically engage and systematically study our human experience of God and deepen our relationship with God.
	Aware that the Baptismal Covenant, Book of Common Prayer, and scripture are foundational sources of inspiration and formation.	The Baptismal Covenant, the Book of Common Prayer, and scripture inform my life/worldview.	Discuss the theology of the Baptismal Covenant, the BCP and scripture and their implications for personal and corporate decision-making with others.	Teach the interconnections of history, theology, and moral decision making based in scripture, the Baptismal Covenant, The Book of Common Prayer.
	T.1	T.2	T.3	T.4

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith in the world (Evangelizing)	Recognize and explore the interrelationship between faith and other disciplines.	Commit to loving God and my neighbor.	Point to and name God's action in the world.	Teach others how to listen to voices from the margins and develop justice-seeking responses that address systemic injustice.
	Wonder how God is incarnate in all of life's big questions and the world's great challenges.	See God's radical love in everyday life.	Join God in action in the world as a follower of Christ.	Embrace diversities with and among cultural and religious groups.
	Acknowledge the existence of evil.	Recognize my responsibility for all of God's creation.	Discuss the things I see as evil in my world with others.	Risk asking and leading dialogue of unspoken questions.
	Explore turning to God in times of challenge and uncertainty.	Acknowledge the imperative to join God's Mission for the world.	Engage in deeper reflections of God's mission and our role in that mission with other communities.	Facilitate the creation of opportunities to join God's Mission with others.
	T.5	T.6	T.7	T.8

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith within the faith community (forming)	Wonder about the meaning of life.	Recognize the joys and obligations of Christian commitment.	Live by a Rule of Life.	Equip others for their discernment and gifts appreciation.
	Recognize my gifts given to me by God.	Appreciate the gifts of others.	Share my gifts in my faith community.	Recognize and cultivate the gifts of others.
	Question who I am.	Engage in ongoing self-reflection about difference to understand historical inequities and suffering caused by religion and indifference.	Risk asking tough questions of my faith community at any level, especially to acknowledge difference and dismantle oppression.	Seek ways to empower my faith community to understand historical inequities and suffering caused by religion and indifference.

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
	Desire a relationship with God.	Participate in spiritual growth opportunities in my faith community.	Participate in a community of practice and/or seek spiritual direction/enrichment with a director, faith mentor or leader.	Invite and inspire others to claim their place in God's Mission.
	Understand prayer as a spiritual conversation.	Participate in community worship, and miss it when I don't.	Embrace liturgical roles and lead worship.	Prepare members for participation and leadership in worship.
	Seek others to share spiritual conversations.	Develop important relationships in my faith community.	Embrace leadership roles within my faith community.	Prepare others for leadership roles.
	RC.1	RC.2	RC.3	RC.4
Signs of Living my faith in the world (Evangelizing)	See God in all people.	Strive to love others regardless of our differences.	Intentionally seek the face of Christ in others and celebrate their uniqueness.	Inspire others to right relationships with God, self, others and all creation.
	See the world through the life and teachings of Jesus.	Engage my neighbor in response to my faith.	Admit my faults and seek forgiveness; I forgive.	Create space for healing and reconciling.
	Think differently about decision-making because of my faith.	Apply my faith when addressing issues.	Strive for justice and peace and witness my faith.	Seek ways to empower my wider community to understand historical inequities and suffering caused by religion and indifference.
	Listen and participate respectfully when various perspectives are presented respectfully.	Participate in conversations that raise spiritual questions with people who do not share my faith tradition.	Connect my actions to God's mission of love, liberation and life for all of creation.	Engage in ongoing collaboration with the wider community to speak truth to power.
	Recognize responsibility to vulnerable people and places.	Participate with my church to address needs in my community.	Share my time, talent, and financial resources sacrificially.	Monitor coherence between what I/we say and what I/we do.
	RC.5	RC.6	RC.7	RC.8

TASK FORCE ON LITURGICAL & PRAYER BOOK REVISION

See: Volume 2, page 620

TASK FORCE ON MINISTRY WITH INDIVIDUALS WITH MENTAL ILLNESS

Membership

The Rev. Dr. David Gortner, *Chair*	Washington, III	2021
The Rt. Rev. David Bailey	Navajoland Area Mission, VIII	2021
Dr. Brandon Beck	West Texas, VII	2021
The Rev. Dr. Jeanine Driscoll	Rio Grande, VII	2021
Ms. Amanda Henes	Milwaukee, V	2021
The Rev. Dr. Robert Phillips	Washington, III	2021
The Rev. Deacon Susan Phillips	Delaware, III	2021
The Rev. John Stewart	Alabama, IV	2021
Ms. Evangeline Warren	Ohio, V	2021
Ms. Alice R. Webley	Southern Virginia, III	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

- The Rt. Rev. John Tarrant, died 8/24/2020.
- Dr. Charles Zimbrick-Rodgers, resigned due to personal reasons, returned to Philadelphia in full-time pediatric medicine 2019.
- The Rt. Rev. David Bailey, did not participate in meetings, no reason given.

Mandate

2018-C034 Ministry to People with Mental Illness and their Families

Resolved, That the 79th General Convention authorize the establishment of a Task Force on Mental Illness to further the Episcopal Church's commitment to, with and for persons with mental illness and their families as reflected in the General Convention resolution 2015-C020, as adopted and which reads:

Resolved, That the 78th General Convention of the Episcopal Church calls upon diocese, congregations, schools and other entities of The Episcopal Church to explore and adopt best practices for the vitality and increased capacity of their mission and ministry in the inclusion, support and spiritual care for persons with mental illness and their families; and be it further

Resolved, That dioceses, congregations, schools and other entities of The Episcopal Church increase understanding about mental illness by providing educational material and training; utilizing existing programs such as the National Alliance on Mental Illness, veterans groups, government departments on mental health, local organizations and other programs; and sharing the information so it is readily accessible.

And be it further;

Resolved, That this task force be appointed jointly by the Presiding Officers, with between 10 and 12 members, two or three of whom shall be bishops, two or three of whom shall be clergy, and not more than six lay persons, and all of the members shall have some professional, family or personal background with mental illness, and that this task force report back to the 80th General Convention; and be it further

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

Summary of Work

The Task Force for Ministry with Individuals with Mental Illness and Their Families took up its work in its first online meeting on February 22nd, 2019. It continued its work with monthly online meetings until December, 2020. The task force gathered for an in-person working conference Sept. 29th – Oct. 2nd, 2019, at the Maritime Center in Baltimore, MD.

In the first months, the task force sought to define its scope and determine its focused work based on members' interests, passions, and insights. The following were points of sustained focus in the task force's work:

- Distinguishing mental illness from other challenges such as cognitive decline, developmental disabilities, addictions, and the ups and downs of everyday life.
- Noting how mental illness intersects with other challenges, including those above as well as profound experiences of poverty, trauma, abuse, neglect, racial injustice, and addiction in people's environment.
- Seeking to diminish and eliminate stigmatization of mental illness.
- Combating negative theological assertions about mental illness and providing more helpful theological frameworks and perspectives.

- Building informational sources to help educate the Episcopal Church about mental illness – its frequency, most common types, and its impact on personal, congregational, and community life.
- Collecting data and stories to build informational sources
- Exploring models for training people locally in effective crisis response, sustained relationship-building, and advocacy for and with people with mental illness.

From these focal points, the task force aimed to gather information, testimonies, and resources to build some on-hand informational tools and best practices for recognizing mental health challenges, providing healthy and supportive interaction, and assisting in appropriate ways that connect people to others professional and informal sources of help. The effort included assembling quick notes on signs and symptoms of some of the major mental illnesses, connecting with resource networks who work with and for people with mental illness, and seeking supportive psychological, pastoral, and theological perspectives.

The group determined to focus on producing single-page (two-sided) informational, testimonial, and resourcing fliers for each of the following topics:

- Mental Illness (a de-stigmatizing overview and introduction)
- Depression
- Anxiety Disorders
- Trauma
- Schizophrenia and Related Thought Disorders
- Bipolar Disorder

In addition, the following topics were discussed as next-level documents to produce:

- Maladaptive personality patterns
- Mental health issues related to addiction
- Eating disorders
- Obsessive-Compulsive Disorder
- Children and Teens (unique and similar dimensions of above major categories)
- Behavior Disorders in Childhood and Early Teen Years

A tertiary set of possible single-page informational documents were mentioned but not pursued as part of this task force's work – these included Attention Deficit Hyperactivity Disorder, various dementias, and other cognitive challenges.

Distilling material into single-page documents has been difficult work. Task force teams first drew together data on frequency and patterns of the most common and most frequently cited forms of mental illness, and listed important signs and symptoms for each. They sought out biblical and theological perspectives that were affirming of the dignity of people facing mental health challenges. They invited testimonial stories of direct experience of mental illnesses in personal, familial, and congregational life. These inputs were then further distilled and tightened into the most essential and helpful pieces to contribute to a single page document for each topic. To date, five drafts have been completed, with several more underway. The task force will work with the Office of General Convention and the Episcopal Church Center to post these one-page fliers in an accessible location on the Episcopal Church website or an allied site, and will seek support to distribute these fliers by print and internet for use across the Episcopal Church.

The task force also explored and examined materials and web-based resources created by other denominations and by ecumenical and interfaith networks. Some of these resources are named in the Resolutions submitted with this report. To date, it appears that the United Church of Christ has made the strongest headway with resources of any denomination examined, with its WISE resources (Welcoming, Inclusive, Supportive, Engaged) for ministry and care with people with mental illness. There are also impressive resources and connections compiled on the Interfaith Network on Mental Illness. The U.S. Department of Health and Human Services' Office for Faith and Opportunity Initiatives developed a helpful roadmap for faith communities, titled Compassion in Action. Together, these provide some excellent starting tools for consideration in educating and training congregations and pastoral teams. The task force recommends development of an Episcopal curriculum for pastoral care and inclusive relationship drawing from these resources, during the next triennium.

The task force came to embrace both Mental Health First Aid (MHFA) and the National Alliance on Mental Illness (NAMI) as the strongest organizations and networks to help the Episcopal Church develop compassionate competency in basic understanding of mental illness, in fundamental skills for helpful and supportive interaction during times of distress, and in normalizing and humanizing relationships with people who experience challenges in mental health. The chair (the Rev. Dr. David Gortner) completed training as an MHFA trainer, in July of 2019. Several other clergy and laity in the Episcopal Church have also already been trained as trainers, including four people in the Union of Black Episcopalians. Three task force members (the Rev. Susan Phillips, the Rev. Jon Stewart, and Dr. Brandon Beck) are also members of NAMI and have noted NAMI's important role in training people in advocacy and in creating support structures for people with mental illness.

The task force is launching some pilot one-day basic MHFA* training sessions for congregations and church organizations in several dioceses and will have completed five such pilot diocesan basic training sessions before the next General Convention. Some partnership has already been fostered with NAMI to help provide some of this training in some locations.

* Please read resolution A108 and its explanation for further information on Mental Health First Aid USA (MHFA) and the reasons for recommending it. The website of Mental Health First Aid USA is at https://www.mentalhealthfirstaid.org/. Information on courses in Spanish is at https://www.mentalhealthfirstaid.org/toma-un-curso/.

Proposed resolutions

A107 Ministry with People with Mental Illness and Their Families

Resolved, the House of _______ concurring, That the 80th General Convention of The Episcopal Church recognize the worldwide prevalence of mental illness and the need for effective ministry with people facing mental health challenges, and the need to continue the work begun with the General Convention resolutions 2015-C020 and 2018-C034; and be it further

Resolved, that The Episcopal Church now equip all its people, both clergy and laity, to interact in compassionate, competent ways with those experiencing mental health challenges; and be it further

Resolved, that the provinces and dioceses of The Episcopal Church utilize resources to strengthen care, inclusion, support, and advocacy for all people (both laity and clergy) who struggle with mental health challenges; and be it further

Resolved, that the provinces and dioceses of The Episcopal Church develop and strengthen resources to support the mental health of their clergy by advocating for clergy to be intentional about their self-care, and realizing that clergy, like anyone else, may also struggle with challenges to mental health.

EXPLANATION

Even prior to the current pandemic, mental health challenges as well as mental illness have constituted significant health problems both in the US and globally. In the US, at least 1 in 4 people struggle with anxiety and 1 in 5 with depression. Globally, anxiety and depression are among the primary causes of disability. Mental health is a public health matter which impacts quality of life for people with mental health problems and their families and friends. And yet, stigmatization of mental illness has persisted, leading to shame-based and fear-based avoidance of admission and discussion of the mental health challenges that people experience.

In our baptismal vows, we promise to respect the dignity of every human person and to seek and serve Christ in all people. Through our work since the General Convention in Austin, TX, we have become convinced that it is time for The Episcopal Church to encourage its members to live more deeply into their baptismal vows. Our country is torn by divisiveness and recent FBI statistics indicate a 3% surge in hate crimes from last year. However, the hate crimes have become more violent. As mental health professionals, we know that where there is hate, there is fear, fear born from misinformation, stereotypes, and myopic interpersonal constellations. When it comes to mental health, there remains an unfortunate stigma rooted in narratives of individual strength and persistence with an insistence on ‘pulling one’s self up by her bootstraps’ as well as ‘snapping out of’ mental distress.

Individuals and families, within our communion, continue to suffer silently with the fall-out of mental illness. The existence of mental illness may not become known to pastoral care ministries in a congregation until a terrible crisis occurs involving law enforcement and or suicide. By remaining silent about mental health issues in our congregations, we enjoin a kind of violence which harms the creatures of God, a violence of silence and separation by which clergy and congregants often distance themselves from those who suffer, out of fear, ignorance, or even apathy.

The resolutions which we are putting forth emphasize the necessity of education and training for lay leaders and clergy. Such endeavors include integrating and requiring information regarding the intersection of pastoral care and mental health into the formation process for persons discerning a call to ordained ministry, much the way Safe-church practices are required. These endeavors also call for mental health first aid training to be provided by dioceses or by provinces for lay leaders and clergy with eventual progress toward train the trainer curricula throughout the TEC.

But Jesus brings relief and release from all shame and stigma. Jesus proclaimed "I have come that you may have life and have it to the full" (John 10:10). As Emmanuel, God-with-us, Jesus communicated that God wants all humans to thrive. Jesus' ministry was summarized in the words he read from Isaiah in the synagogue: "The Spirit of the Lord is upon me…to bring good news to the poor…to proclaim release to the captives and recovery of sight to the blind, to let the oppressed go free, to proclaim the year of the Lord's favor" (from Luke 4:18-19).

We are calling for methodical approaches in our denomination for preparing laity and clergy to recognize and respond effectively to community members' mental health matters. We imagine a church wide commitment in which nurturing mental health and addressing mental illness is a well-integrated component of congregational life and pastoral care. We envision programmatic education for the ministry of the baptized of all orders so that ministry embodies attention to and care for all peoples' mental health right along with their spiritual and interpersonal well-being. We want to encourage the wider Church to endorse the importance of clergy well-being by endorsing the necessity that congregations and their lay leadership support clergy wellness via respecting boundaries, encouraging adherence to time off, and realizing that clergy also struggle with mental health issues. Now, with the additional complexities and uncertainties precipitated by the COVID pandemic, mental health matters have intensified. Anxiety and depression and substance use, common, prevalent mental health issues, are exacerbated. Tending to mental health issues will be essential to learning how to be and 'do' church differently.

A108 Training of trainers for Episcopal Provinces in Mental Health First Aid

Resolved, the House of _______ concurring, That the 80th General Convention authorize launch of training people in dioceses, congregations, schools, seminaries, and other entities of the Episcopal Church in the forming of caring relationships with people with mental illness and their families, in recognizing possible mental health crises and interacting in healthy and supportive ways with people in crisis, and in advocacy and bridge-building support, using the resources and training processes of Mental Health First Aid and the National Alliance on Mental Illness, as well as the Interfaith Network on Mental Illness, WISE for Mental Health, and other helpful organizations and networks; and be it further

Resolved, that the 80th General Convention authorize and fund the training of at least 15 regional trainers in Mental Health First Aid (MHFA) for the sake of providing basic MHFA training in the Provinces of the Episcopal Church, drawing as well upon MHFA trainers who are part of the Union of Black Episcopalians along with other Episcopal MHFA trainers, with training to be completed by June, 2023, so that they will become available as resource trainers for the dioceses in each Province; and be it further

Resolved, that the 80th General Convention recommend requirement of training in Mental Health First Aid and general awareness of mental health and illness for all active clergy and lay staff in the church entities of each diocese, with issuance of certifications beginning by the next General Convention in 2024; and be it further

Resolved, that the 80th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $35,000 to help fund the training of the regional trainers for the Provinces.

EXPLANATION

Weakness in response to the challenges of mental illness, within the Episcopal Church as well as across community life, is directly linked to lack of awareness and of developing habits and practices for responding. The lack of awareness and healthy response is the result of avoidance of the topic altogether due to shame and stigmatization. We fail to learn what we avoid and intentionally banish from awareness.

This is a nationwide and worldwide problem that persists because of inaction. People facing challenges in mental health often remain in hiding. Others avoid approaching those facing such challenges because of uncertainty about what to do, embarrassment about raising a "touchy" subject, and fear of doing unintended harm. Still others communicate harmful ideas that blame people for the mental health challenges they are experiencing. All of this adds to a default culture of stigma, shame, and silence.

Different networks of support, training, and advocacy have emerged in the past decades. The National Alliance of Mental Illness (NAMI) began in 1979 and has spread across the U.S. with local affiliates helping build networks of support, education and advocacy for those with mental illness. Mental Health First Aid (MHFA) was first developed and created in Australia in 2001, to help people in all areas of public life to think differently about mental illness, become more aware of its frequency and impact, and become confident in effective ways to help people who are experiencing mental health distress. MHFA is now present in 24 countries and launched in 2007 in the United States. Other faith-based networks began to emerge, to help strengthen congregational and ministerial capacities for care, support, companionship, and advocacy for people with mental illness. These include the Interfaith Network on Mental Illness, the WISE for Mental Health resources of the United

Church of Christ, and the Partnership Center for Faith and Opportunity Initiatives of the U.S. Department of Health and Human Services. Each of these networks is developing tools and resources that are compassionate, affirming of dignity, and evidence-based in their helpfulness.

The Episcopal Church can benefit greatly by tapping into the resources and tools of these various networks and by forging partnerships to increase opportunities for training of its laity and clergy. After reviewing the various resources and methods of instruction, the Task Force for Ministry to Individuals with Mental Illness determined that MHFA provided solid, consistent training with resources that could become widely adopted. The Task Force supports use of all networks' training resources and tools, with MHFA leading the way in training the Episcopal Church's laity and clergy in skills for helping people who are in the midst of distress. The training helps people become skilled enough to step in and help pave the way for other professionals and supportive networks. The skills learned focus on how to approach someone experiencing distress, how to assess the situation and be particularly attentive to potential for self-harm, how to listen non-judgmentally and with care, when and what to offer as helpful information, and how to encourage someone to seek support. The training helps people understand some of the experience of mental illness and thus goes a long way to destigmatizing the realities of mental illness. The website for Mental Health First Aid USA is at https://www.mentalhealthfirstaid.org/. Information on courses in Spanish is at https://www.mentalhealthfirstaid.org/toma-un-curso/.

The Task Force on Ministry with Individuals with Mental Illness considers this MHFA training as an essential baselines of skills and habits to develop in all congregations, schools and seminaries, and other entities of the Episcopal Church. The Union of Black Episcopalians has also recognized and embraced the value of MHFA training for its leaders and congregations, and already has at least four of its members who have been certified by MHFA as trainers. These members are in Provinces II, III, and IV. Other certified Episcopal MHFA trainers are in a range of Provinces, including VII and VIII. NAMI also supports MHFA and has agreed to provide training for the Episcopal Diocese of Delaware. The Task Force is coordinating with other dioceses to pilot training, using currently certified MHFA trainers in the Episcopal Church or in NAMI.

The Resolution to train and certify Episcopal trainers across Episcopal Provinces, if affirmed, will anchor MHFA training in each Province and its dioceses. The number of new trainers to be certified will secure a minimum of two trainers per Province Number of regional trainers. In addition, Provinces are increasingly sharing resources across territories, allowing for MHFA to extend its reach to more remote areas. During the COVID-19 pandemic, MHFA pivoted to create online training possibilities. These adaptations also allow for a wider reach across regions.

MHFA training is recommended as a foundation for demystifying, destigmatizing, and naturalizing the reality of mental illness, and for helping Episcopal Church laity and clergy learn and become confident in healthy and helpful interaction with people who are experiencing distress and challenge in mental health. Next steps will include local and regional partnership and resource utilization with NAMI, INMI, WISE, and other networks.

A109 Developing Curriculum and Required Training for Clergy in Mental Health Pastoral Care

Resolved, the House of _______ concurring, That the 80th General Convention authorize the creation and launch of new curriculum to train all Episcopal ordained clergy, candidates, and postulants in mental health and mental illness awareness that emphasizes pastoral care, the forming of caring relationships, and effective advocacy. This new curriculum will incorporate and expand upon a range of resources including Mental Health First Aid, the National Alliance on Mental Illness, the Interfaith Network on Mental Illness, WISE for Mental Health, and other helpful organizations and networks; and be it further

Resolved, that all those to be ordained from January 2024 onward be trained in this new curriculum that will include training in Mental Health First Aid and in the advocacy work of the National Alliance on Mental Illness; and be it further

Resolved, that the 80th General Convention requires the training of all active priests, deacons, and bishops in this curriculum for mental health and mental illness awareness by December, 2028; and be it further

Resolved, that the 80th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $15,000 to support curriculum development for this training of clergy.

EXPLANATION

The explanations offered with the resolutions of the Task Force on Ministry with Individuals with Mental Illness set the stage for this Resolution. Further education and training for clergy and laity alike in the realities of mental illness in our communities and churches will lead to a demystification, destigmatization, and increased confidence in care, support, and advocacy for people experiencing challenges in mental health.

Education and training for clergy in awareness and in basic skilled response is essential, as clergy can help set the tone for care, support, and advocacy in Episcopal congregations, schools and seminaries, and other church entities. Research from prior decades has indicated that clergy often function in society as gatekeepers and gateways for people to enter into mental health care. Even in an age of declining religious affiliation, people may first come to their pastors, rabbis, imams, priests, or deacons with life concerns that carry with them matters of mental health.

However, education and training in pastoral care for clergy has not consistently given sufficient or even the most basic awareness, understanding, and development of best practices in relation to mental illness and challenges to mental health. Resources for ministerial and congregational care are available and are continuing to be developed, across denominations and faiths. However, these are not consistently incorporated into seminary- and diocesan-based education and training for deacons and priests.

General ignorance of Episcopal clergy about mental illness is not an acceptable sustained practice. General ignorance leads to avoidance of and lack of awareness of how mental health challenges can impact individuals, families, congregations, and communities. Failure by clergy to engage the topic of mental health as a part of life only serves to sustain a culture of avoidance, shame, silence, and unintended stigmatization. But clergy will not engage the topic or approach a situation of mental health distress if they are not equipped to understand, recognize, and effectively respond.

A foundation in Mental Health First Aid can provide a good introductory understanding. But, to help communities become more equipped and resourceful, to increase effectiveness in building bridges for people into helpful mental health care, and to help open healthy space for affirmative inclusion of people with mental illness in the life and mission of the Church, a fuller curriculum and set of resources for education and training of clergy needs to be developed. The aim is not to turn clergy into alternative mental health counselors. Rather, the aim is to equip clergy with sufficient knowledge and skill that they have confidence in helping to create good space and respectful boundaries for people struggling with mental illness, connecting wisely with mental health professionals and with mental health support networks, and fostering more positive cultures of response and relationship in the congregations, schools, and entities of the Episcopal Church and the communities they inhabit.

The expectation set in this Resolution makes clear that clergy education and training about mental health and mental illness will become required in the same way that training in prevention of sexual abuse and misconduct is required and anti-racism training is required. With over 25% of the population, nationally and worldwide, experiencing significant mental health challenges at any time, it is essential that clergy become more fully aware of and ready to engage with people experiencing mental health challenges, to be equipped to help Episcopal Church entities become responsive and natural in care, support, and advocacy, and to offer whole and life-affirming spiritual and theological perspectives about mental illness.

A110 Continuation and Expansion of Task Force on Ministry to Individuals with Mental Illness

Resolved, the House of _______ concurring, That the 80th General Convention continue The Task Force on Ministry to Individuals with Mental Illness, in order to aid in the direction and development and provision of resources, trainings, and curricula in pastoral and ministerial mental health care for The Episcopal Church, its provinces, dioceses, parishes, seminaries, schools, and affiliated organizations, among all of its bishops, priests, deacons, and parishioners; and be it further

Resolved, That The Task Force on Ministry with Individuals with Mental Illness be expanded to eighteen in its membership that represents a depth and range of professional, personal, familial, and organizational experience with mental illness, in order to successfully develop and provide aforementioned resources, trainings, and curricula;

Resolved, That the Task Force on Ministry with Individuals with Mental Illness, in its expanded version in conjunction with its development of and provision of aforementioned trainings, will develop and share resources for The Episcopal Church, its various organizations, and all of its people centered on pastoral and ministerial mental health care; and be it further

Resolved, That this expanded Task Force report back on its actions to the 81st General Convention; and be it further

Resolved, That the 80th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $21,700 to complete resources for churchwide distribution and use by the next triennium.

EXPLANATION

In the three-year period in which the Task Force on Ministry with Individual with Mental Illness has begun its work, the world and especially The United States experienced instability in ways that do not often occur to this degree or in this many simultaneous ways. The task force convened because mental health concerns in The Episcopal Church are finally being realized as part of our lay and ordained spiritual calling and not simply a secular psychological matter. As the three years of service for this task force come to an end, the situation of the world and country with respect to COVID-19, politics and leadership, and racism exacerbate stress, depression, anxiety and other mental health concerns for those in our churches and schools. This task force must continue as we, The Church, continue not just to observe, but to preemptively create systems through which both lay and ordained persons can seek, find, and execute healing practices around the strains of our times. The continuation and expansion of the task force will support the completion and distribution of informational resources, the implementation of trainings around the United States (and beyond) by which lay and ordained leaders can learn how to better recognize signs of mental health distress and minister to those in need of that crucial mental health care from a spiritual/religious standpoint, and the development of robust curriculum that will expand upon the trainings offered by partner organizations.

Budget

All expenses incurred for the work of this task force were tied solely to the single in-person working conference held at the Maritime Institute in Baltimore, MD, September 29th through October 2nd, 2019. These expenses were tallied and paid in full directly by the Office of General Convention. Total expenses for travel, room and board, and meeting room use was far less than the original $30,000 that was originally marked as part of approval of Resolution C034 in 2018.

The chair of the task force (the Rev. Dr. David Gortner) was supported by Virginia Theological Seminary to enroll in and complete training as a trainer with Mental Health First Aid. These expenses included $2,000 training tuition, $460 air travel, $220 car rental, and $200 in meals and expenses not otherwise covered in the training package (lodging and food were provided by in-town family members of the chair).

Remaining expenses are already covered by the administrative and technological support provided by the Office of General Convention, and are not accounted as part of this task force's expenses.

Continuance recommendation

This task force recommends that it continue its work until the next General Convention in June, 2022. During this time, the task force will complete its written resources for print and web publication. The task force requests financial support to bring this project to closure.

The task force further recommends and urges continuation and expansion of the task force as an interim body or commission through the next triennium and beyond, to pursue and bring to fulfillment the Resolutions proposed in this report for the sake of building and ensuring competence in ministry with people with mental illness and their families.

Budget 2022-2024 if continuation is approved.

Budget Item	**2022**	**2023**	**2024**	**Triennium Total**
Task Force Meetings (Two full 3-day meetings for 18 members, or more meetings of task force subgroups)				
• Travel ($500/person)		$9,000	$9,000	$18,000
• Lodging & food ($450/person 3 nights)		$8,100	$8,100	$16,200
Mental Health First Aid Training and Certification of Trainers				
• Onsite 3-day training for 15 trainees		$24,000		$24,000
• Travel for 15 trainees ($500/person -- to be paid in part through Province or diocese sponsoring trainee)		$7,500 (minus regional contributions)		$3,500
• Lodging & food for trainees ($450/person – to be paid in part through Province or diocese sponsoring trainee)		$6,750 (minus regional contributions)		$2,500
Provincial travel support for trained trainers				
• Travel support $250/trainer each year		$3,750	$3,750	$7,500
Training manual for provincial participants -- $25 each – paid by each participant or supporting congregation, school, or diocese				
Zoom monthly working meetings, as supported technically and administratively by the General Convention Office				
TOTAL				$71,700

TASK FORCE ON NEW FUNDING FOR CLERGY FORMATION

Membership

The Rev. Brendan Barnicle, *Chair*	Oregon, VIII	2021
The Rt. Rev. Thomas Breidenthal, *Vice-Chair*	Southern Ohio, V	2021
Dr. Courtney V. Cowart	New York, II	2021
Mrs. Jill Heller	Milwaukee, V	2021
The Rev. Elizabeth Henry-McKeever	Arkansas, VII	2021
The Rev. Andrew Hybl	Arkansas, VII	2021
The Rev. JoAnn Jones	Pennsylvania, III	2021
The Very Rev. Cynthia Kittredge	Texas, VII	2021
Mr. James Murphy	New York, II	2021
Mr. Joseph Swimmer	Washington, III	2021
The Rt. Rev. John Harvey Taylor	Los Angeles, VIII	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

2018-A027 New Funding for Clergy Formation

Resolved, the House of Deputies concurring, That the 79th General Convention create a task force with membership appointed by the President of the House of Deputies and the Presiding Bishop consisting of ten (10) representatives. The task force shall include, but not be limited to, representatives from local diocesan clergy formation programs, representatives from seminaries (particularly persons involved in tuition assistance programs), fund development professionals within The Episcopal Church, and representatives from organizations (such as the Society for the Increase of Ministry and United Thank Offering) that provide funds to assist persons in obtaining advanced theological education. The task force shall be made up of two (2) bishops, three (3) priests or deacons, and five (5) members of the laity. It shall develop and implement a plan to provide need-based scholarship funding to individuals pursuing theological education who are preparing to serve as priests or deacons in non-stipendiary, or part-time or bi-vocational ministries. This plan shall work to expand the funding available to aspiring priests and deacons who are engaged in theological education other than full-time seminary education. In addition to considering other funding sources, the task force shall examine the possible use of donor-directed endowment funds held in trust by the Domestic and Foreign Missionary Society [DFMS] as a partial means to fulfill this mandate; and be it further

Resolved, That the task force shall begin on January 1, 2019, and end at the end of the 80th General Convention, unless its mandate is extended by that Convention; and be it further

Resolved, that the task force shall communicate information about any scholarship plan to members of The Episcopal Church and provide a report to the 80th General Convention; and be it further

Resolved, That the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $60,000 for the implementation of this resolution.

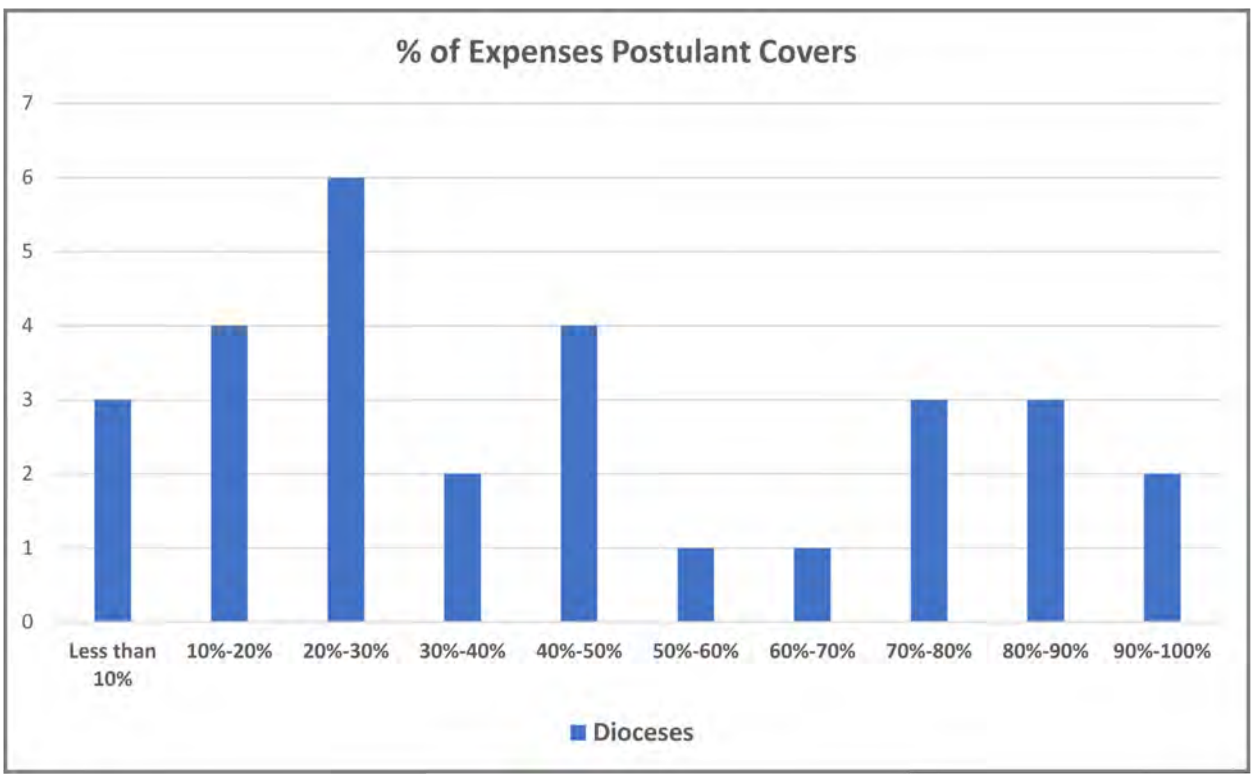
Summary of Work

The Task Force on New Funding of Clergy Formation began its work on January 30, 2019, and met again on February 25, 2019. At those initial meetings, it was clear that there was not sufficient data available to fulfill the resolutions that prompted the creation of this task force. First, it was unclear how many people are in the clergy formation process across the Episcopal Church, including people who are called to serve in part-time, non-stipendiary or bi-vocational roles. Second, it was unclear what funding is currently available for people in the formation process. Our hope was that there might be underutilized pockets of money in the Episcopal Church that could be used for clergy formation. Without existing sources of funding, the Task Force was concerned that new funding would require new fundraising, and there are already multiple fundraising demands across the Church.

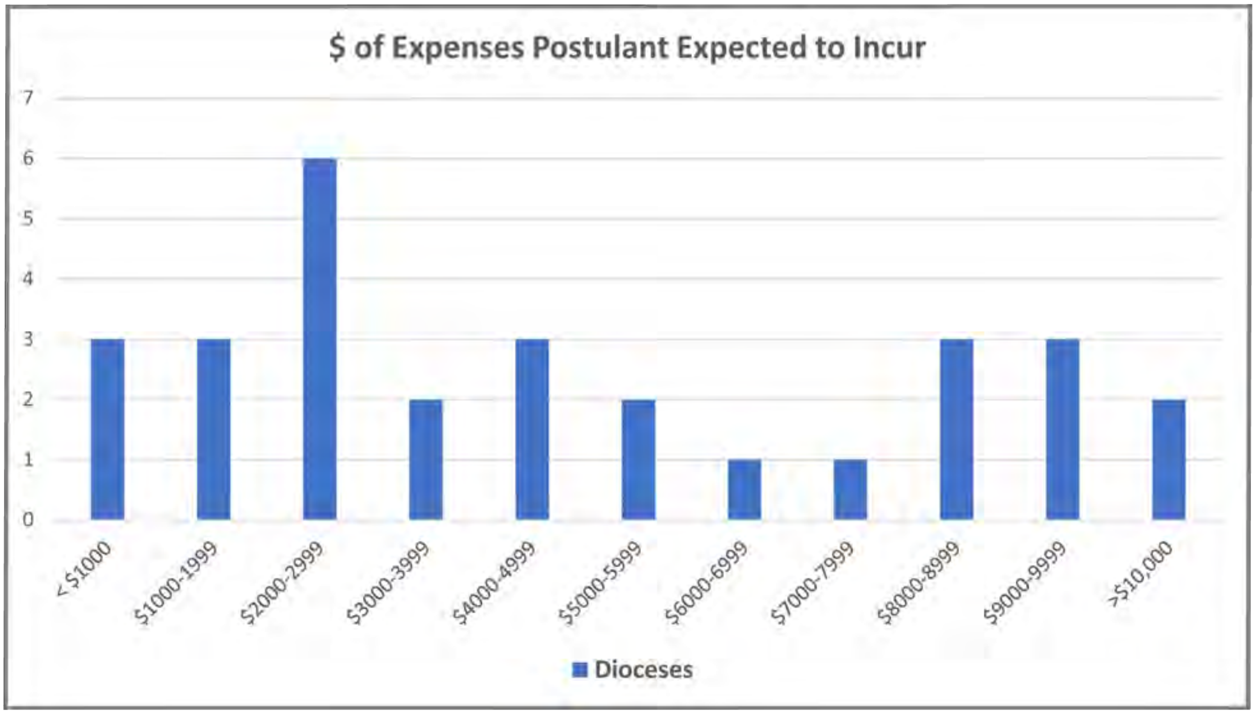
Therefore, during the April 2, 2019 meeting, the Task Force started to develop a survey that could be sent to the House of Bishops to clarify the amount of new funding that was necessary and potential sources for the funding. With the invaluable help of Brian Murray from the General Convention Office, the Task Force drafted a survey, and the survey was distributed in January of 2020. The survey closed on February 28, 2020. The survey closed just as the COVID-19 pandemic began. As a result, the Task Force did not meet again until October 2, 2020.

More importantly, the Task Force did not meet earlier because the results of the survey were inconclusive. While the results were disappointing, they also highlighted the challenges in answering the questions that the Task Force had posed to the House of Bishops. While diocese know how many postulants that they have in the formation process, the funding available to those people varies widely. 29 dioceses responded to the survey. Four dioceses clearly stated that they provide no financial assistance for people called to serve as priests or deacons in part-time, non-stipendiary or bi-vocational calls. Of those dioceses that do provide financial assistance, four dioceses fully cover all of the tuition and fees of postulants in the formation process. Four dioceses cover the cost of books. Sadly, during this time of remote learning, not a single diocese was providing funding for technology (i.e. computers and/or software) for postulants, at the time of the survey. Since the COVID-19 pandemic, those policies may have changed. Three dioceses will cover travel expenses. One diocese covers childcare and that same diocese also covers healthcare costs.

The overwhelming majority of diocese provide partial assistance for some, but not all, of the expenses of clergy formation. As a result, there is a broad range of coverage. The survey asked what percent of expenses the dioceses expected the postulant to cover personally. As the chart below demonstrates, the expectations varying dramatically.



The survey also revealed that dioceses may be underestimating the amount of money that postulants are spending for training and education. The table below shows the range of expectations.



Only three of these dioceses had local formation programs. The other diocese did not explain how they expected postulants to fund their formation. When asked about additional resources, the survey respondents pointed to seminary scholarships and Episcopal church scholarships.

As we finish our work, the Task Force on New Funding for Clergy Formation offers no resolutions, and it does not ask to continue its work. Nevertheless, the issued raised by the resolution that lead to the formation of the Task Force remain as important as ever. The research from the Task Force survey paints a picture of a very fragmented approach to funding clergy formation, and it is likely to remain fragmented under the current system. This funding system raises important issue of equity, equality and church leadership. While this Task Force did not address many of these issues, it is the hope of the Task Force that the Church will continue to confront these challenges and provide access to formation for all of God's People.

TASK FORCE ON THE BUDGET PROCESS

Membership

Mr. Thomas Little, *Chair*	Vermont, I	2019
Mr. N. Kurt Barnes	New York, II	2019
The Rev. Canon Mike Ehmer	Northwest Texas, VII	2019
The Rt. Rev. Jeff Fisher	Texas, VII	2019
Ms. Sally Johnson	Minnesota, VI	2019
Ms. Nancy Koonce	Idaho, VIII	2019
Mr. Bryan Krislock	Olympia, VIII	2019
The Rt. Rev. Stephen Lane	Maine, I	2019
The Rev. Mally Ewing Lloyd	Massachusetts, I	2019
Mr. David Quittmeyer	Central Gulf Coast, IV	2019
The Hon. Rose H. Sconiers	Western New York, II	2019
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

2018-A102 Create a Task Force on Budget Process

Resolved, That transparency throughout The Episcopal Church's budget process, and timely participation in that process by the wider Church, are critical to the whole Church's engagement in and support for the budget adopted by the General Convention; and be it further

Resolved, That the Treasurer of the General Convention, the Executive Council, the Joint Standing Committee on Program, Budget and Finance, and the Standing Commission on Structure, Governance, Constitution and Canons work cooperatively to examine the triennial budget process to

(a) identify ways to enhance transparency throughout the process,

(b) foster timely participation by the wider Church,

(c) clarify the respective roles of the General Convention and the Executive Council in developing the triennial budget and its funding priorities and choices, and

(d) promote effective and collaborative budgeting and management between and among all involved leadership and staff; and be it further

Resolved, That this examination conclude with a jointly prepared report published by December 31, 2019, with recommendations to the Executive Council and the 80th General Convention, including proposals for any needed revisions to the governing documents of the Church, the Executive Council and the General Convention so that the governing documents are consistent in all material respects; in preparing the report, resort to assistance from those knowledgeable about the Joint Rules of Order of the General Convention is encouraged.

Summary of Work

I. Task Force Origins

Resolution 2018-A102 directed Executive Council, the Treasurer of General Convention, the Joint Standing Committee on Program, Budget, and Finance (PB&F) and the Standing Commission on Structure, Governance, and Constitution and Canons to work cooperatively to examine the current budget process and ensure that the budget development process is transparent throughout, provides ample time for churchwide input, and that the governing documents make it clear which entity or entities are responsible for the triennial budget development, funding priorities and choices, and that the budget process promotes effective budgeting and management among all involved. To accomplish this, the Presiding Officers appointed the Task Force to undertake this work. In addition to the Resolution 2018-A102 mandate, the Task Force sought a streamlined budget process in order to conserve human and financial resources.

The Task Force members have extensive financial and budgetary experience in developing, explaining, and legislating The Episcopal Church (the Church) triennial budget. Members included the Treasurer of the General Convention (who also serves as the Treasurer of the Domestic and Foreign Missionary Society (DFMS) and as the Chief Financial Officer of the Executive Council), members of the Executive Council who serve on its Standing Committee on Finance, members of the Joint Standing Committee on Program, Budget and Finance (PB&F), members of the Standing Commission on Structure, Governance and Constitution and Canons, and longtime General Convention participants, including those familiar with Church canons and structure, as well as those who see the budget process with fresh eyes.

The Task Force and its work should be understood in the context of a continuum of discernment and dialogue over many years about how the Church develops a prudent and spirit-filled budget that stewards the resources God has given to the Church. (For more detail about the starting point and rationale for the Task Force's work, see the Report to the 79th General Convention (Blue Book Report) of the Standing Commission on Structure, Governance, Constitution & Canons at pp. 402-403.)

II. Summary of Work

A. Points of Agreement

1. There are inconsistencies in the Church's governing documents that make lines of authority and responsibility for budget development and oversight unclear, perhaps even contradictory.

2. General Convention, through its legislative process, sets the Church's priorities for mission, program, governance, and operations for the triennium. In accordance with Canons I.1.8 and I.4.6 General Convention adopts the budget for The Episcopal Church, including the formula for the assessments paid by dioceses.

3. Despite the best efforts of Executive Council and PB&F, each of which publishes a draft of the budget and solicits feedback, there is a general sense that the budget process lacks transparency and continuity.

4. The budget, in the current process, cannot fully reflect General Convention priorities since it must be finalized, published, and adopted before General Convention has completed work on resolutions that may call for funding. Carefully weighing the various options, the Task Force concluded that there are distinct advantages to finalizing the budget after General Convention to take into consideration the full range of General Convention actions and priorities for mission, program, governance, and operations.

5. Some Deputies, Bishops, and members of the wider Church are frustrated that resolutions requesting funding that, in some cases, have been worked on for the whole triennium, are not funded because they are adopted after General Convention has adopted the budget. Others are frustrated because the budget that comes to General Convention has little room for funding initiatives adopted by the General Convention. Distrust of the budget process and the budget itself may develop in these circumstances. The Task Force recommends making Executive Council's budget adjustment authority more explicit, perhaps in a Joint Rule, to address this concern, at least partially.

6. The current two-phase process, in which Executive Council, with input from the whole Church and staff, creates a draft budget and then hands it over to PB&F for revision during General Convention, consumes enormous human and financial resources as staff and others must bring PB&F members up to speed, repeating much of the work they have already done with Executive Council's finance committee and Executive Council itself. Despite their best efforts and having PB&F representatives at all of Executive Council's finance committee meetings, PB&F members often report that they do not have a full appreciation of the nuances of the budget they are tasked with modifying and presenting to General Convention. (See Appendix I for a fuller explanation of current process and its disadvantages)

7. Executive Council is the governing body of the Church between General Conventions. It is also the Board of Directors of the Domestic and Foreign Missionary Society, the Church's corporate entity. It has both canonical authority and legal responsibility as the board of the corporate entity for the financial health of the Church. As such, it makes sense that Executive Council should have complete and sole responsibility for monitoring, amending, and implementing budget changes during the triennium and to develop and approve each annual budget, giving due consideration to the priorities set by General Convention and the approved Church triennial budget into account.

8. PB&F is broadly representative of the Church, comprising one Bishop and two Deputies from each Province. Similarly, Executive Council is broadly representative of the Church as half of the members are elected by General Convention and half by the Provinces.

9. It is time to take bold action to simplify the process and to ensure that the budget reflects and supports the direction to which God is calling the whole Church.

B. Recommendations

The Task Force recommends charging Executive Council, through a standing budget committee, with responsibility for the entire creation of the Church's triennial budget and its presentation to General Convention.

General Convention's authority to amend and approve the triennial Church budget and to approve the assessment rate and formula for diocesan assessments would remain unchanged. What would change is that after General Convention the budget committee of Executive Council would review all the actions of General Convention and recommend revisions to the approved triennial budget to Executive Council so it better reflects the priorities and actions of General Convention.

In addition, the Task Force recommends that Executive Council have sole and express responsibility for revising the budget throughout the triennium. Under this recommendation, PB&F would have no role or responsibility for any part of the budget process. Seeing as how this is PB&F's only function, we propose to discontinue PB&F. If General Convention were to disagree, the Task Force strongly believes it would be prudent to reduce the size of the 27-member PB&F to a size that would enable it to function with greater efficiency and effectiveness while holding it accountable, ensuring reasonably broad representation, and assuring financial expertise.

C. Rationale

The Task Force believes that streamlining the budget process so that one entity, broadly representative of the Church, is responsible for the whole of the budget development process will be a better use of human and financial resources with less duplication of efforts. It will also allow for clarity in communications, knowing that just one entity is responsible for information flow. And it will be easier to maintain transparency of the process and the resulting budget.

The Task Force further believes that Executive Council is the body that should be assigned responsibility for the whole of the triennial budget development process. In the Church's governance structure, Executive Council has broad canonical and fiduciary responsibilities for the fiscal health of the organization, controls, policies, and expenditures. As noted, Executive Council is broadly representative of the Church since half of Executive Council members are elected by General Convention and the other half by the Provinces.

In addition, finalizing the budget after General Convention allows for greater churchwide input into the budget, beginning with the development process and ending with all the General Convention certified resolutions. Perfecting the budget after General Convention will allow all legislation to be considered for inclusion in the budget, respecting General Convention's authority to set the Church's priorities.

Despite Executive Council's best efforts to include all of the priorities set by resolution, some of the actions adopted by General Convention may not be funded because General Convention regularly adopts resolutions with funding implications in excess of projected revenue.

III. Proposal for Improving the Budget Process

A. Prior to General Convention – Budget Creation & Transparency

Under the Task Force's proposal, Executive Council would establish a standing budget committee, with the membership defined in the Bylaws of the Executive Council, and members appointed by the Presiding Officers. Its membership could comprise two or three members of the Executive Council's finance committee, a representative from each of Executive Council's Joint Standing Committees, the Treasurer of General Convention, the Chief Financial Officer, and others, whether or not members of Executive Council, as may be needed to ensure balanced representation and to include needed expertise.

The budget committee would maintain open communications with Executive Council and other Church governing and interim bodies. It would reach out to the wider Church, through Executive Council, about the budget preparation process and progress. It would offer a variety of specific opportunities for input and feedback.

Working with staff and with input as described above, the budget committee would develop a draft triennial budget which would be shared at least once, in draft form, with the whole Church for churchwide feedback, and would finally be reviewed and approved by Executive Council at a meeting at least three months before General Convention. As soon as possible following this Executive Council meeting, the proposed budget would be published churchwide, and again, feedback to the budget committee would be invited.

For comparison and background, all current and recent financial documents, including year-to-date figures, audit, and triennial and annual budgets, would continue to be available on the Finance Office page of episcopalchurch.org and at generalconvention.org.

B. During General Convention

General Convention sets the Church's priorities for mission, program, governance, and operations by its actions, passing resolutions which embody God's call to the Church. The Church budget is a concrete reflection of where the heart of the Church lies.

While General Convention Deputies and Bishops will have had the Executive Council's proposed budget for several months, the Executive Council, possibly through its budget committee, would present the budget to a joint session of General Convention close to the opening of General Convention, perhaps on the second or third legislative day, and would then hold at least one open hearing during General Convention to solicit reactions to and suggestions for the budget. Toward the end of General Convention, the two Houses would vote to approve the Church budget and the diocesan assessment rate and formula included in the budget, with or without amendment. Because there will be a diligent and coordinated effort after General Convention to review all adopted Resolutions for budget impacts, the Task Force believes that a review at General Convention of resolutions with budget impacts will no longer be necessary.

C. After General Convention – Budget Finalized

The budget would be subject to changes by Executive Council following General Convention based upon (a) legislative action of General Convention, (b) changes in the Church's financial circumstances, including losses or gains in revenues and/or expenses after General Convention adjourns, and (c) Executive Council's exercise of its canonical authority and fiduciary responsibilities for the budget. This would take place following General Convention and prior to the last Executive Council meeting of the calendar year in which General Convention is held. During this time, the budget committee will review the Church's adopted triennial budget considering the whole of General Convention priorities for mission, program, governance and operations as set by resolutions adopted by General Convention. It may seek input from any source, including from staff, Joint Standing Committees of Executive Council, and former budget committee members (whose expertise may be valuable). Executive Council would then finalize the upcoming annual budget.

It is important to note that, as in the past, General Convention regularly adopts resolutions with funding implications in excess of projected revenue, meaning that a number of actions adopted by General Convention may not be funded.

D. Responsibility for Budget Amendments Between General Conventions

As noted earlier, Executive Council is the governing body of the Church between General Conventions. It is also the Board of Directors of the Domestic and Foreign Missionary Society (DFMS) and thereby holds all corporate authority over the assets of the DFMS which holds all the assets of the Church. It is responsible for the fiscal health of the organization, financial controls, policies, and expenditures, etc. These dual responsibilities impose on Executive Council the ultimate oversight responsibility for the Church, its assets, budget, and operations.

The Task Force recommends that the Executive Council, both as the Board of the DFMS and as the governing body of the Church between General Conventions, using the expertise of the Treasurer, the Chief Financial Officer, the budget committee and Executive Council's finance committee, have complete and sole responsibility for monitoring and amending each triennial and annual budget between General Conventions. Executive Council would, of course, be accountable to the next General Convention for its budget adjustments.

The approved triennial and annual budgets, and any budget adjustments approved by Executive Council during the triennium, will continue to be available for public view on the episcopalchurch.org and the generalconvention.org websites.

IV. Other Governance Changes May Be Needed

The Task Force expects that there will be other Church governing body governance document changes needed to fully implement its recommendations. These include Executive Council Bylaw changes (among other things, to establish a standing budget committee); and existing references to the Joint Standing Committee on Program, Budget and Finance scattered throughout various Church documents and websites, inasmuch as PB&F is embedded in many different places, if only by reference.

V. Budget Requests and Implications

The Task Force does not foresee any material adverse budget impacts from its recommendations. The Task Force does not propose to extend its life past the current triennium.

VI. Amendments to Canons and Rules of Order; Explanations

The Task Force proposes to amend Canons I.1.2.m, I.1.2.o, I.1.8, I.1.9, I.1.11, I.1.13, I.2.6, I.2.8, I.4.3, I.4.5, I.4.6.a, I.4.6.c, I.4.6.i, I.5.5, I.9.10; House of Bishops Rule of Order V.D.d; House of Deputies Rule of Order VI.C.3.v.a and IX.A.1.ii.a.1; and Joint Rules of Order II.10, IV.14, and VII.21. Each proposed amendment, and its explanation follow.

CANONS

Canon I.1.2.m

I.1.2.m Every Commission whose Report requests expenditure out of the *budget* ~~fund~~s of *The Episcopal Church* ~~General Convention~~ (except for the printing of the Report) *shall include that request in its report to the General Convention and in accordance with Canon I.4.6* ~~present to the Joint Standing Committee on Program, Budget, and Finance its written request, on or before the first business day of the session. Resolutions requiring additional expenditures shall be immediately referred to the Joint Standing Committee on Program, Budget, and Finance. No resolution involving such expenditures shall be considered unless so presented and until after report of the Joint Standing Committee on Program, Budget, and Finance~~.

Explanation

If the elimination of the Joint Standing Committee on Program, Budget and Finance is adopted, then these revisions to Canon I.1.2.m provide a helpful redundancy, or reminder, to Standing Commission, together with existing Canon I.1.2.k.3.

Canon I.1.2.o

Canon I.1.2.o ~~Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Presiding Bishop and the President of the House of Deputies, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Presiding Bishop and the President of the House of Deputies, and the composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Presiding Bishop and President of the House of Deputies and reauthorized by the Executive Council.~~

Explanation

The Task Force proposes to delete this canon here and move it, with small amendments, to a new Canon I.4.5. This subsection was added to the canons in 2018. It was proposed by the Standing Commission on Structure, Governance and Constitution and Canons with the following explanation: "This change permits task forces to be created and commence prior to the first meeting of Executive Council, allowing them more time in the triennium to do their work." Since the subsection calls on the Presiding Officers to review all General Convention resolutions calling for "study or further action" and to recommend to the Executive Council the bodies they believe necessary to carry out the work; and for the Executive Council to act on such recommendations, including providing funding, it makes more sense for this provision to be in the canon on the Executive Council, Canon I.4.

Canon I.1.8

I.1.8. The General Convention shall adopt, at each regular meeting, a budget *for The Episcopal Church, including* ~~to provide~~ for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, the necessary expenses of the President of the House of Deputies including the staff and Advisory Council required to assist in the performance of the duties and matters related to the President's office, and the applicable Church Pension Fund assessments. To defray the expense of this budget, an assessment shall be levied upon the Dioceses of the Church in accordance with a formula which the *General* Convention shall adopt as part of ~~this~~ *The Episcopal Church budget* ~~Expense Budget~~. It shall be the duty of each Diocesan Convention to *pay its assessment* ~~forward~~ to the Treasurer of the General Convention *according to the schedule established by the Executive Council*~~annually, on the first Monday of January, the amount of the assessment levied upon that Diocese~~.

Explanation

These amendments implement a generic, uniform title for the triennial budget of the Church, "The Episcopal Church budget," and requires dioceses to pay their assessments, not all on January 1 of each year, but according to the schedule (currently monthly) established by Executive Council.

Canon I.1.9

I.1.9. The Treasurer of the General Convention shall have authority to borrow, in behalf and in the name of the *Executive Council* ~~General Convention~~, such a sum as may be judged by the Treasurer to be necessary to help *pay* ~~defray~~the expenses of ~~t~~*The Episcopal Church budget adopted under Canon I.1.8* ~~General Convention~~, with the approval of the ~~Presiding Bishop and the~~ Executive Council.

Explanation

These amendments (i) state that the Treasurer's borrowing is on behalf of Executive Council, the governing body with authority between General Conventions; (ii) conform the title of the budget as explained above under Canon I.1.8; and (iii) clarify that any borrowing requires the approval of Executive Council, of which the Presiding Bishop, under Canon I.4.2.a, is the Chair and chief executive officer.

Canon I.1.11

I.1.11. ~~The Treasurer shall submit to the General Convention at each regular meeting thereof a detailed budget in which the Treasurer proposes to request appropriations for the ensuing budgetary period and shall have power to expend all sums of money covered by this budget, subject to such provisions of the Canons as shall be applicable.~~

Explanation

The Task Force's proposed amendments to Canon I.4.6 make clear that Executive Council would have the sole authority to propose the triennial budget to the General Convention. Accordingly, there would be no need for the Treasurer to also propose the same budget. (Note that the remaining three sections of Canon I.1.11 will need to be renumbered.)

Canon I.1.13

I.1.13.a There shall be an Executive Office of the General Convention, to be headed by a General Convention Executive Officer to be appointed jointly by the Presiding Bishop and the President of the House of Deputies with the advice and consent of the Executive Council. The Executive Officer shall report to and serve at the pleasure of the Executive Council.

b. The Executive Office of the General Convention shall include the functions of the Secretary of the General Convention and the Treasurer of the General Convention and those of the Manager of the General Convention and, if the several positions are filled by different persons, such officers shall serve under the general supervision of the General Convention Executive Officer, who shall also coordinate the work of the Committees, Commissions, Boards and Agencies funded by ~~t~~*T*he *Episcopal Church* General Convention Expense ~~B~~*b*udget.

Explanation

The Task Force's proposed amendments to Canon I.4.6 make clear that Executive Council would have the sole authority to propose the triennial budget to the General Convention. Accordingly, there would be no need for the Treasurer to also propose the same budget.

Canon I.2.6

I.2.6. The stipends of the Presiding Bishop and such personal assistants as may be necessary during the Presiding Bishop's term of office for the effective performance of the duties, and the necessary expenses of that office, shall be fixed by the General Convention and shall be provided for in the budget to be submitted by the ~~Treasurer~~ *Executive Council*, as provided in ~~the~~ Canon I.4.6~~, entitled, "Of the General Convention."~~

Explanation

These amendments conform Canon I.2.6 to the Task Force's other proposed canonical amendments establishing the Executive Council as the Church governing body that submits a proposed triennial budget to the General Convention, and cross-references that canon.

Canon I.2.8

I.2.8. Upon the acceptance of the Presiding Bishop's resignation for reasons of disability prior to the expiration of the te,m of office, the Presiding Bishop may be granted, in addition to whatever allowance may be received from The Church Pension Fund, a disability allowance to be paid by the Treasurer of the General Convention in an amount to be fixed by the ~~Joint Standing Committee on Program, Budget, and Finance~~, and ratified at the next regular meeting of the General Convention.

Explanation

Consistent with prior proposed amendments, above, this change deletes the reference to the Joint Standing Commission on Program, Budget, and Finance.

Canon I.4.3

I.4.3. Upon joint nomination of the Chair and the Vice-Chair, the Executive Council shall elect an Audit Committee of the Council and the Domestic and Foreign Missionary Society. The Committee shall be composed of six members: one from the Executive Council committee with primary responsibility for financial matte,-; ~~one from the Joint Standing Committee on Program, Budget, and Finance;~~ and the remaining ~~four~~ *) ve* from members of the Church-at-large having experience in general business and financial practices. The members shall serve for a term of three years beginning on January 1 following a regular meeting of the General Convention or immediately following their appointment, whichever comes later, and continue until a successor is appointed, and may serve two consecutive terms, after which a full triennium must elapse before being eligible for re-election. Annually the Audit Committee shall elect a Chair of the Committee from among its members. The Audit Committee shall regularly review the financial statements relating to all funds under the management or control of the Council and the Domestic and Foreign Missionary Society and shall report thereon at least annually to the Council.

Upon recommendation of the Audit Committee, the Executive Council shall employ on behalf of the Council and the Domestic and Foreign Missionary Society an independent Ce,tified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. After receipt of the annual audit, the Audit Committee shall recommend to the Council and the Domestic and Foreign Missionary Society what action to take as to any matte,s identified in the annual audit and accompanying management letter. The responsibilities of the Audit Committee shall be set out in an Audit Committee Charter. The Audit

Committee shall review, at least annually, the Committee's Charter and recommend any changes to the Executive Council for approval.

Explanation

This amendment is consistent with the Task Force's recommendation to transfer all responsibilities of the Joint Standing Committee on Program, Budget, and Finance to the Executive Council, thereby eliminating the need for that Joint Standing Committee.

Canon I.4.4

~~Sec. 4. The Executive Council may establish by its By-laws Committees and *ad hoc* working groups or task forces, which may include or consist of non-members, to be nominated jointly by the Chair and Vice-Chair and appointed by the Council, as may be necessary to fulfill its fiduciary responsibility to the Church. All Committees and *ad hoc* working groups and task forces of Executive Council will cease to exist at the close of the next General Convention following their creation unless extended by Executive Council. Executive Council may revoke, rescind, or modify the mandate or charter of all Executive Council Committees, *ad hoc* working groups and task forces not otherwise created by Canon.~~

I.4.4 *Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Chair and the Vice-Chair, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Chair and Vice-Chair, and the composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Chair and Vice-Chair and reauthorized by the Executive Council.*

Explanation

As explained regarding the deletion of Canon I.1.2.0, since this canon calls on the Presiding Officers to recommend to the Executive Council the creation of various bodies to carry out the work specified by the General Convention, and for the Executive Council to allocate the funds for such work, it makes more sense to include this provision in the canon on the Executive Council than in the canon on the General Convention. The text of subsection o was moved in its entirety with the only change being to change "Presiding Bishop" to "Chair" and "President of the House of Deputies" to "Vice-Chair," the titles they hold in their roles in the Executive Council.

Canon I.4.6

Sec. 6

a. *At least four months prior to the next regular meeting of the General Convention, the Executive Council shall submit to the Secretary of the General Convention a proposed Episcopal Church budget for the ensuing budgetary period. The ensuing budgetary period shall comprise the calendar years starting with the January1st following the adjournment of the most recent regular meeting of the General Convention and ending with the December 31st following the adjournment of the next regular meeting of the General Convention.*~~The Executive Council shall submit to the Joint Standing Committee on Program, Budget, and Finance the proposed Budget for The Episcopal Church for the ensuing budgetary period, which budgetary period shall be equal to the interval between regular meetings of the General Convention. The proposed Budget shall be submitted not less than four months before the ensuing General Convention is convened.~~
b. Revenue to support the Budget for The Episcopal Church shall be generated primarily by a single assessment of the Dioceses of the Church based on a formula which the General Convention shall adopt as part of its Budget process. If in any year the total anticipated income for Budget support is less than the amount required to support the Budget approved by the General Convention, the canonical portion of the Budget for The Episcopal Church shall have funding priority over any other budget areas subject to any decreases necessary to maintain a balanced Budget.
c. ~~After the preparation of the Budget, the Treasurer shall, at least four months before the sessions of the General Convention, transmit to the Bishop of each Diocese and to the President of each Province a statement of the existing and the proposed assessments necessary to support the proposed Budget for The Episcopal Church. The Joint Standing Committee on Program, Budget, and Finance shall also submit to the General Convention, with the Budget, a plan for the assessments of the respective Dioceses of the sum needed to execute the Budget.~~
~~d.~~ *c.* There shall be joint sessions of the two Houses for the presentation of the Budget for The Episcopal Church; and thereafter consideration shall be given and appropriate action taken thereon by the General Convention.

~~e.~~ *d.* Upon the adoption by the General Convention of a Budget for The Episcopal Church and the planned assessments for the budgetary period, the Council shall formally advise each Diocese of its share of the total assessments to support the Budget for The Episcopal Church.
~~f.~~ *e.* Full payment of the diocesan assessment shall be required of all Dioceses, effective January 1, 2019.
~~g.~~ *f.* Effective January 1, 2016 Council shall have the power to grant waivers from the full annual assessments of Dioceses within the limit established by the General Convention. Any diocese may appeal to Executive Council for a waiver of the assessment, in full or in part, on the basis of financial hardship, a stated plan for working toward full payment, or other reasons as agreed with the Executive Council. Effective January 1, 2019, failure to make full payment or to receive a waiver shall render the diocese ineligible to receive grants or loans from the Domestic and Foreign Missionary Society unless approved by Executive Council.
~~h.~~ *g.* The Council shall have the power to expend all sums of money covered by the Budget and estimated Budgets approved by the General Convention, subject to such restrictions as may be imposed by the General Convention, including but not limited to the priority declaration set forth in Section 6.b of this Canon. It shall also have power to undertake such other work provided for in the Budget approved by the General Convention, or other work under the jurisdiction of the Council, the need for which may have arisen after the action of the General Convention, as in the judgment of the Council its income will warrant.
~~i.~~ *h.* In respect of the Budget for The Episcopal Church the Executive Council shall have the power to consider and vote to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant subject to such restrictions as may be imposed by the General Convention. It shall also have power to approve other initiatives proposed by the Chair or otherwise considered by Council~~, in consultation with the Chair of the Joint Standing Committee on Program, Budget and Finance,~~ between meetings of the General Convention, as in the judgment of the Council are prudent and which the Church revenues will be adequate to support.
~~j.~~ *i.* Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council.
~~k.~~ *j.* Each Diocese shall report annually to the Executive Council the name and address of each new congregation, and of each congregation closed or removed by reason of any of the following:

1. dissolution of the congregation;

2. removal of the congregation to another Diocese due to cession or retrocession of geographic territory in which the congregation is located, pursuant to Articles V.6 or VI.2 of the Constitution;
3. removal of the congregation to a new physical location or address, identifying both the location or address from which the congregation has removed, and the successor location or address; and
4. merger of the congregation into one or more other congregations, in which case, the Diocese shall include in its report the names of all congregations involved in the merger, and the physical location and address at which the merged congregations shall be located.

Explanation

These amendments further implement the Task Force's recommendation to have the Executive Council submit the proposed triennial budget to the General Convention, specifically to the Secretary of the General Convention. The changes also delete a redundant subsection requiring the Treasurer to also submit the proposed budget, and clarifies that the budget operates on a calendar year. The amendments strike current subsection c; for many years, once released the proposed budget has been distributed to the entire Church, making it unnecessary to direct Executive Council to send it to all Bishops and Provinces. Finally, the mention in subsection i of the Joint Standing Committee on Program, Budget and Finance should be struck.

Canon I.4.7

Sec. 7

a. Every Missionary Bishop or, in case of a vacancy, the Bishop in charge of the jurisdiction, receiving aid from ~~the General Convention Budget~~ *The Episcopal Church budget*, shall report at the close of each fiscal year to the Council, giving account of work performed, of money received from all sources and disbursed for all purposes, and of the state of the Church in the jurisdiction at the date of such report, all in such form as the Council may prescribe.

b. The Ecclesiastical Authority of every Diocese receiving aid from the General Convention Budget shall report at the close of each fiscal year to the Council, giving account of the work in the diocese supported in whole or in part by that aid.

Explanation

This amendment implement a generic, uniform title for the triennial budget of the Church, "The Episcopal Church budget."

Canon I.5.5

I.5.5. The expenses of the Archives of The Episcopal Church shall be ~~shared by~~ *included in* ~~the General Convention~~ *the budget for The Epi! copal Church*~~and the Executive Council~~.

Explanation

The Task Force concluded that the concept of sharing the Archives' expenses between the General Convention and the Executive Council is outdated. The triennial budget makes an appropriation for the Archives, and the canon need not mention any sharing of expenses., as there is no di5 erence between the "Executive Council budget" and the "General Convention budget." The Task Force's recommendation is to use throughout the canons and Rules of order the term, The Episcopal Church budget.

Canon I.9.10

I.9.10. ~~The Synod of a Province may take over from the Executive Council, with its consent, and during its pleasure, the administration of any given work within the Province. If the Province shall provide the funds for such work, the constituent Dioceses then members of, and supporting, such Province shall receive proportional credit therefor upon the quotas assigned to them for the support of the Program of the Church, provided that the total amount of such credits shall not exceed the sum appropriated in the budget of the Executive Council for the maintenance of the work so taken over.~~

Explanation

This canon was adopted in 1928 and has been little used, according to the Annotated Constitution and Canons (White & Dykman). A Province that sought to take over the implementation of a General Convention-funded program could propose a plan for that to the Executive Council, which could take action to support the request, on a case by case basis with full access to the facts. The Task Force believes this canon is no longer needed and in addition seems arcane.

RULES OF ORDER

House of Bishops Rules of Order

Note: Under House of Bishops Rule of Order V.O.2, those Rules of Order may only be amended by the House of Bishops – not by the General Convention. The Task Force, and the Bishops serving on it, recommend that the House of Bishops amend its Rule of Order V.D.d as follows.

House of Bishops Rule of Order V.D.d

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

Explanation

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this Rule of Order is no longer necessary.

House of Bishops Rule VIII.I

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

1. "advanced age" shall mean at least 62 years of age;
2. "bodily infirmity" shall mean either a condition for which one is eligible for disability retirement benefits from the Church Pension Fund or Social Security Administration, or a physical or mental impairment that a physician or psychiatrist(approved by the Presiding Bishop) certifies would likely result in eligibility for such disability retirement benefits should the Bishop continue in active episcopal ministry;
3. "office created by the General Convention" shall mean a ministry funded by ~~the General Convention Budget~~*The Episcopal Church budget*and approved by the Presiding Bishop; and
4. "mission strategy" shall mean a strategy that would allow the election of an indigenous member of the clergy of a non-domestic diocese as Bishop, or that would allow a diocese to implement a new mission strategy as determined by the Presiding Bishop, or that would allow

a transition in episcopal leadership after a Diocesan Bishop or Bishop Suffragan has served 10 or more years in either or both of those offices.

Explanation

This amendment implements a generic, uniform title for the triennial budget of the Church, "The Episcopal Church budget."

House of Deputies Rules of Order

Note: Under House of Deputies XIX.A, those Rules of Order may only be amended by the House of Deputies – not by the General Convention. The Task Force, and the Deputies serving on it, recommend that the House of Deputies amend its Rules of Order VI.C.3.v.a and IX.A.1.ii.a.1, as follows.

House of Deputies Rule of Order VI.C.3.v.a

3. Placing items on the Consent Calendar. Every Committee Reports on Resolutions or other matters will be placed on the Consent Calendar automatically unless:

i. the committee votes to exclude it from the Consent Calendar;
ii. it is removed in accordance with these Rules;
iii. the Rules of Order, the Joint Rules of Order, the Canons, or the Constitution require a different procedure for considering the item;
iv. the item has been set by a Special Order of Business; or
v. the item is one of the following:

~~a. a report from the Joint Standing Committee on Program, Budget and Finance;~~
~~b.~~ a. an election;
~~c.~~ b. a Resolution of privilege or courtesy;
~~d.~~ c. the confirmation of the election of the Presiding Bishop.

Explanation

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this House of Deputies Rule of Order is no longer necessary.

House of Deputies Rule of Order IX.A.1.ii.a.1

A. General Rules on Other Committees

1. Appointment and Creation

   i. The President may designate other Committees for the work of the House of Deputies at General Convention no later than 90 days before the first legislative day of General Convention except that Conference Committees will be appointed during General Convention as needed.

   ii. The Committees may include the following and any others that the President designates:

      a. Resolution Review

         1. The Resolution Review Committee will review all Resolutions submitted prior to General Convention to review that they are consistent with the polity of this Church, and that they are in the form required by the Canons~~, and to assess whether they have funding implications~~.

Explanation

This Resolution Review Committee "budget impact" task will no longer be necessary under the structure and sequencing of the Task Force's recommendations.

Joint Rules of Order

Pursuant to Joint Rule of Order X.25, the Task Force Recommends that the Joint Rules of Order be amended as follows.

Joint Rule of Order II.10

II: Joint Standing Committee on Program, Budget, and Finance

~~10.~~

a. ~~There shall be a Joint Standing Committee on Program, Budget, and Finance, consisting of 27 persons being members of the General Convention (one Bishop, and two members of the House of Deputies, either Lay or Clerical, from each Province), who shall be appointed not later than the fifteenth day of December following each regular Meeting of the General Convention, the Bishops to be appointed by the Presiding Bishop, the Deputies by the President of the House of Deputies.~~

~~The Secretary of the General Convention and the Treasurer of the General Convention and the Chief Financial Officer of the Executive Council shall be members ex officiis, without vote.~~

~~The Joint Standing Committee may appoint advisers, from time to time, as its funds warrant, to assist the Joint Standing Committee with its work.~~

~~**b.** Organization. The Joint Standing Committee shall elect its Chair from its membership, and such other officers as needed.~~

~~The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the Budget, as well as Sections on Funding and Presentation, the size and composition of the several Sections to be determined by the Joint Standing Committee.~~

~~The Chairs of each Section shall be elected by the Joint Standing Committee; the several Sections shall elect their own Secretaries from among their own membership.~~

~~The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; *provided*, *however*, that final action on Budget shall be taken only by the full Committee, either in meeting assembled or by a vote by mail.~~

~~**c.** During the interim between regular Meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose.~~

~~Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof.~~

~~In respect of the Budget for The Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by mail, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention.~~

~~With regard to the General Church Program, the Joint Standing Committee shall:~~

~~i. Meet and consult with the Executive Council, or its Administration and Finance Committee, on adjustments to the program priorities, and on alternate income generating resources;~~

~~ii. Receive from the Executive Council, not less than four months prior to the meeting of General Convention, the proposed General Church Program for the upcoming triennium, including a proposed detailed Budget for the year next following that of such Convention;~~

~~iii. Meet in such places as it shall determine, sufficiently in advance of the next General Convention to expedite its work;~~

~~iv. Conduct hearings upon such proposed Program and Budget; and~~

~~v. Consider such proposed Program and Budget and report thereon to the next succeeding General Convention.~~

d. ~~Not later than the third day prior to the adjournment of each regular meeting of the General Convention, the Joint Standing Committee shall report to a Joint Session, pursuant to Canon, a proposed Budget for The Episcopal Church for the ensuing Convention period, subject to the approval of the said Budgets subject also to increase, reduction, or elimination of items, based on open hearings held during the General Convention and by subsequent concurrent action by the House of Deputies and the House of Bishops.~~

Subsequent sections would be renumbered.

Explanation

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this Joint Rule of Order is no longer necessary. (Note that the deletion of this Joint Rule of Order will require the succeeding Joint Rules of Order to be renumbered.)

Joint Rule of Order IV.14

~~IV: Supplemental Money Bills~~

14. ~~After the adoption of the Budget for The Episcopal Church, any resolution calling for the expenditure of any moneys (or containing implied funding) shall be unfunded.~~

Subsequent sections V - X should be renumbered.

Explanation

The Task Force proposes to change the budgeting process for the triennial Episcopal Church budget so that after General Convention a budget committee of the Executive Council will review all resolutions adopted by the General Convention, especially those with budget implications and those setting the priorities for the Church, and make recommendations to the Executive Council for appropriate revisions of the budget adopted by the General Convention. Therefore, it would no longer be the case that resolutions adopted after adoption of the triennial budget would never be funded. In fact, such resolutions could be funded by Executive Council after it completes its post-General Convention review of all adopted resolutions to see if they should be funded by the triennial budget finalized by the Executive Council.

Joint Rule of Order VII.21

VII.21.

a. The Joint Standing Committee on Nominations, .", ough the Office of the Secretary of General Convention, will secure background checks on its and any other nominees for Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund. These background checks will cover criminal records checks and sexual offende, re!#-., y checks in any state where a proposed nominee has resided during the prior seven (7) years, any appropriate professional licensing bodies with jurisdiction over a nominee's professional status and any violations of state or federal securities or banking laws. The records checks of proposed nominees from outside the United States will cover the same information from comparable authorities in the place of principal residence of the proposed nominee.

b. The required background check will be done prior to accepting a proposed nomination.

c. Background check results will be reviewed by the Office of the Secretary of General Convention. If that Office, after consultation with the Chief Legal Officer, determines that the results should preclude a person from holding the office sought, the Office shall share the determination with the proposed nominee and remit that determination, but not the background check results, to the nominating authority. Background check information shall not be shared beyond the Office of the Secretary of General Convention, the Chief Legal Officer, and proposed nominees who request their own information. The cost of background checks under this rule shall be covered by ~~the General Convention~~ *The Episcopal Church* budget.

Explanation

This is another amendment conforming the title of the budget to "The Episcopal Church" budget.

Proposed resolutions

A048 Amend Canons and Rules of Order to Implement the Recommendations of the Task Force on The Budget Process

Resolved, the House of ____ concurring, That Canons I.1.2.m, I.1.2.o, I.1.8, I.1.9, I.1.11, I.1.13, I.2.6, I.2.8, I.4.3, I.4.5, I.4.6.a, I.4.6.c, I.4.6.i, I.5.5, I.9.10; House of Bishops Rule of Order V.D.d and VIII.I; House of Deputies Rule of Order VI.C.3.v.a and IX.A.1.ii.a.1; and Joint Rules of Order II.10, IV.14, and VII.21, be amended as follows:

CANONS

Canon I.1.2.m

m. Every Commission whose Report requests expenditure out of the *budget* ~~funds~~ of The *Epi! copal Church* ~~General Convention~~ (except for the printing of the Report) shall *include that request in i"! eport to the General Convention and in accordance with Canon I-2-3* ~~present to the Joint Standing Committee on Program, Budget, and Finance its written request, on or before the 6,st business day of the session. Resolutions requiring additional expenditures shall be immediately referred to the Joint Standing Committee on Program, Budget, and Finance. No resolution involving such expenditures shall be considered unless so presented and until after report of the Joint Standing Committee on Program, Budget, and Finance.~~

Canon I.1.2.o

o. ~~Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Presiding Bishop and the President of the House of Deputies, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Presiding Bishop and the President of the House of Deputies, and the composition of such committees and task forces - "all reflec. ."e diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Presiding Bishop and President of the House of Deputies and reauthorized by the Executive Council.~~

Canon I.1.8

Sec. 8. The General Convention shall adopt, at each regular meeting, a budget *for The Epi! copal Church, including* ~~to provide~~ for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, the necessary expenses of the President of the House of Deputies including the staff and Advisory Council required to assist in the performance of the duties and matters related to the President's office, and the applicable Church Pension Fund assessments. To defray the expense of this budget, an assessment shall be levied upon the Dioceses of the Church in accordance with a formula which the *General* Convention shall adopt as part of ~~this~~ *The Episcopal Church budget* ~~Expense Budget~~. It shall be the duty of each Diocesan Convention to *pay its assessment* ~~forward~~ to the Treasurer of the General Convention *according to the schedule established by the Executive Council* ~~annually, on the first Monday of January, the amount of the assessment levied upon that Diocese~~.

Canon I.1.9

Sec. 9. The Treasurer of the General Convention shall have authority to borrow, in behalf and in the name of the *Executive Council* ~~General Convention~~, such a sum as may be judged by the Treasurer to be necessary to help *pay* ~~defray~~ the expenses of ~~t~~*The Episcopal Church budget adopted under Canon I.1.8* ~~General Convention~~, with the approval of the ~~Presiding Bishop and the~~ Executive Council.

Canon I.1.11

Sec. 11. ~~The Treasurer shall submit to the General Convention at each regular meeting thereof a detailed budget in which the Treasurer proposes to request appropriations for the ensuing budgetary period and shall have power to expend all sums of money covered by this budget, subject to such provisions of the Canons as shall be applicable.~~

Canon I.1.13

Sec. 13.

a. There shall be an Executive Office of the General Convention, to be headed by a General Convention Executive Officer to be appointed jointly by the Presiding Bishop and the President of the House of Deputies with the advice and consent of the Executive Council. The Executive Officer shall report to and serve at the pleasure of the Executive Council.

b. The Executive Office of the General Convention shall include the functions of the Secretary of the General Convention and the Treasurer of the General Convention and those of the Manager of the General Convention and, if the several positions are filled by different persons, such officers shall serve under the general supervision of the General Convention Executive Officer, who shall also coordinate the work of the Committees, Commissions, Boards and Agencies funded by ~~t~~*The Episcopal Church* ~~General Convention Expense B~~*budget*.

Canon I.2.6

Sec. 6. The stipends of the Presiding Bishop and such personal assistants as may be necessary during the Presiding Bishop's term of office for the effective performance of the duties, and the necessary expenses of that office, shall be fixed by the General Convention and shall be provided for in the budget to be submitted by the ~~Treasurer~~ *Executive Council*, as provided in ~~the~~ Canon I.4.6~~, entitled, "Of the General Convention."~~

Canon I.2.8

Sec. 8. Upon the acceptance of the Presiding Bishop's resignation for reasons of disability prior to the expiration of the term of office, the Presiding Bishop may be granted, in addition to whatever allowance may be received from The Church Pension Fund, a disability allowance to be paid by the Treasurer of the General Convention in an amount to be fixed by the *Executive Council*~~Joint Standing Committee on Program, Budget, and Finance~~, and ratified at the next regular meeting of the General Convention.

Canon I.4.3

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

Upon recommendation of the Audit Committee, the Executive Council shall employ on behalf of the Council and the Domestic and Foreign Missionary Society an independent Certified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. After receipt of the annual audit, the Audit Committee shall recommend to the Council and the Domestic and Foreign Missionary Society what action to take as to any matters identified in the annual audit and accompanying management letter. The responsibilities of the Audit Committee shall be set out in an Audit Committee Charter. The Audit Committee shall review, at least annually, the Committee's Charter and recommend any changes to the Executive Council for approval.

Canon I.4.4

Sec. 4. ~~The Executive Council may establish by its By-laws Committees and *ad hoc* working groups or task forces, which may include or consist of non-members, to be nominated jointly by the Chair and Vice-Chair and appointed by the Council, as may be necessary to fulfill its fiduciary responsibility to the Church. All Committees and *ad hoc* working groups and task forces of Executive Council will cease to exist at the close of the next General Convention following their creation unless extended by Executive Council. Executive Council may revoke, rescind, or modify the mandate or charter of all Executive Council Committees, *ad hoc* working groups and task forces not otherwise created by Canon.~~

Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Chair and the Vice-Chair, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive

Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Chair and Vice-Chair, and the composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Chair and Vice-Chair and reauthorized by the Executive Council.

Canon I.4.6

Sec. 6

a. *At least four months prior to the next regular meeting of the General Convention, the Executive Council shall submit to the Secretary of the General Convention a proposed Episcopal Church budget for the ensuing budgetary period. The ensuing budgetary period shall comprise the calendar years starting with the January1st following the adjournment of the most recent regular meeting of the General Convention and ending with the December 31st following the adjournment of the next regular meeting of the General Convention.*~~The Executive Council shall submit to the Joint Standing Committee on Program, Budget, and Finance the proposed Budget for The Episcopal Church for the ensuing budgetary period, which budgetary period shall be equal to the interval between regular meetings of the General Convention. The proposed Budget shall be submitted not less than four months before the ensuing General Convention is convened.~~

b. Revenue to support the Budget for The Episcopal Church shall be generated primarily by a single assessment of the Dioceses of the Church based on a formula which the General Convention shall adopt as part of its Budget process. If in any year the total anticipated income for Budget support is less than the amount required to support the Budget approved by the General Convention, the canonical portion of the Budget for The Episcopal Church shall have funding priority over any other budget areas subject to any decreases necessary to maintain a balanced Budget.

~~**c.** After the preparation of the Budget, the Treasurer shall, at least four months before the sessions of the General Convention, transmit to the Bishop of each Diocese and to the President of each Province a statement of the existing and the proposed assessments necessary to support the proposed Budget for The Episcopal Church. The Joint Standing Committee on Program, Budget, and Finance shall also submit to the General Convention, with the Budget, a plan for the assessments of the respective Dioceses of the sum needed to execute the Budget.~~

~~d.~~*c.* There shall be joint sessions of the two Houses for the presentation of the Budget for The Episcopal Church; and thereafter consideration shall be given and appropriate action taken thereon by the General Convention.

~~e.~~ *d.* Upon the adoption by the General Convention of a Budget for The Episcopal Church and the planned assessments for the budgetary period, the Council shall formally advise each Diocese of its share of the total assessments to support the Budget for The Episcopal Church.

~~f.~~ *e.* Full payment of the diocesan assessment shall be required of all Dioceses, effective January 1, 2019.

~~g~~.*f.* Effective January 1, 2016 Council shall have the power to grant waivers from the full annual assessments of Dioceses within the limit established by the General Convention. Any diocese may appeal to Executive Council for a waiver of the assessment, in full or in part, on the basis of financial hardship, a stated plan for working toward full payment, or other reasons as agreed with the Executive Council. Effective January 1, 2019, failure to make full payment or to receive a waiver shall render the diocese ineligible to receive grants or loans from the Domestic and Foreign Missionary Society unless approved by Executive Council.

~~h~~.*g.* The Council shall have the power to expend all sums of money covered by the Budget and estimated Budgets approved by the General Convention, subject to such restrictions as may be imposed by the General Convention, including but not limited to the priority declaration set forth in Section 6.b of this Canon. It shall also have power to undertake such other work provided for in the Budget approved by the General Convention, or other work under the jurisdiction of the Council, the need for which may have arisen after the action of the General Convention, as in the judgment of the Council its income will warrant.

~~i~~.*h.* In respect of the Budget for The Episcopal Church the Executive Council shall have the power to consider and vote to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant subject to such restrictions as may be imposed by the General Convention. It shall also have power to approve other initiatives proposed by the Chair or otherwise considered by Council~~, in consultation with the Chair of the Joint Standing Committee on Program, Budget and Finance,~~ between meetings of the General Convention, as in the judgment of the Council are prudent and which the Church revenues will be adequate to support.

~~j~~.*i.* Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council.

~~k~~.*j.* Each Diocese shall report annually to the Executive Council the name and address of each new congregation, and of each congregation closed or removed by reason of any of the following:

1. dissolution of the congregation;

2. removal of the congregation to another Diocese due to cession or retrocession of geographic territory in which the congregation is located, pursuant to Articles V.6 or VI.2 of the Constitution;

3. removal of the congregation to a new physical location or address, identifying both the location or address from which the congregation has removed, and the successor location or address; and

4. merger of the congregation into one or more other congregations, in which case, the Diocese shall include in its report the names of all congregations involved in the merger, and the physical location and address at which the merged congregations shall be located.

Canon I.5.5

Sec. 5. The expenses of the Archives of The Episcopal Church shall be ~~shared by~~ *included in* the ~~General Convention the~~ *budget for The Episcopal Church*~~and the Executive Council~~.

Canon I.9.10

~~**Sec. 10.** The Synod of a Province may take over from the Executive Council, with its consent, and during its pleasure, the administration of any given work within the Province. If the Province shall provide the funds for such work, the constituent Dioceses then members of, and supporting, such Province shall receive proportional credit therefor upon the quotas assigned to them for the support of the Program of the Church, provided that the total amount of such credits shall not exceed the sum appropriated in the budget of the Executive Council for the maintenance of the work so taken over.~~

RULES OF ORDER

House of Bishops Rules of Order

Note: Under House of Bishops Rule of Order V.O.2, those Rules of Order may only be amended by the House of Bishops – not by the General Convention. The Task Force, and the Bishops serving on it, recommend that the House of Bishops amend its Rule of Order V.D.d as follows.

House of Bishops Rule of Order V.D.d

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

House of Bishops Rule VIII.I

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

1.“advanced age” shall mean at least 62 years of age;

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

3.“office created by the General Convention” shall mean a ministry funded by ~~the General Convention Budget~~*The Episcopal Church budget* and approved by the Presiding Bishop; and

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

House of Deputies Rules of Order

Note: Under House of Deputies XIX.A, those Rules of Order may only be amended by the House of Deputies – not by the General Convention. The Task Force, and the Deputies serving on it, recommend that the House of Deputies amend its Rules of Order VI.C.3.v.a and IX.A.1.ii.a.1, as follows.

House of Deputies Rule of Order VI.C.3.v.a

3. Placing items on the Consent Calendar. Every Committee Reports on Resolutions or other matters will be placed on the Consent Calendar automatically unless:

i. the committee votes to exclude it from the Consent Calendar;

ii. it is removed in accordance with these Rules;

iii. the Rules of Order, the Joint Rules of Order, the Canons, or the Constitution require a

different procedure for considering the item;

iv. the item has been set by a Special Order of Business; or

v. the item is one of the following:

~~a. a report from the Joint Standing Committee on Program, Budget and Finance;~~

~~b.~~ a. an election;

~~c.~~ b. a Resolution of privilege or courtesy;

~~d.~~ c. the confirmation of the election of the Presiding Bishop.

House of Deputies Rule of Order IX.A.1.ii.a.1

A. General Rules on Other Committees

1. Appointment and Creation

i. The President may designate other Committees for the work of the House of Deputies at General Convention no later than 90 days before the first legislative day of General Convention except that Conference Committees will be appointed during General Convention as needed.

ii. The Committees may include the following and any others that the President designates:

a. Resolution Review

1. The Resolution Review Committee will review all Resolutions submitted prior to General Convention to review that they are consistent with the polity of this Church, and that they are in the form required by the Canons~~, and to assess whether they have funding implications~~.

Joint Rules of Order

Pursuant to Joint Rule of Order X.25, the Task Force Recommends that the Joint Rules of Order be amended as follows.

Joint Rule of Order II.10

II: Joint Standing Committee on Program, Budget, and Finance

~~10.~~

~~a. There shall be a Joint Standing Committee on Program, Budget, and Finance, consisting of 27 persons being members of the General Convention (one Bishop, and two members of the House of Deputies, either Lay or Clerical, from each Province), who shall be appointed not later than the fifteenth day of December following each regular Meeting of the General Convention, the Bishops to be appointed by the Presiding Bishop, the Deputies by the President of the House of Deputies.~~

~~The Secretary of the General Convention and the Treasurer of the General Convention and the Chief Financial Officer of the Executive Council shall be members ex officiis, without vote.~~

~~The Joint Standing Committee may appoint advisers, from time to time, as its funds warrant, to assist the Joint Standing Committee with its work.~~

~~b. Organization. The Joint Standing Committee shall elect its Chair from its membership, and such other officers as needed.~~

~~The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the Budget, as well as Sections on Funding and Presentation, the size and composition of the several Sections to be determined by the Joint Standing Committee.~~

~~The Chairs of each Section shall be elected by the Joint Standing Committee; the several Sections shall elect their own Secretaries from among their own membership.~~

~~The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; *provided*, *however*, that final action on Budget shall be taken only by the full Committee, either in meeting assembled or by a vote by mail.~~

~~c. During the interim between regular Meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose.~~

~~Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof.~~

~~In respect of the Budget for The Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by mail, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention.~~

~~With regard to the General Church Program, the Joint Standing Committee shall:~~

~~i. Meet and consult with the Executive Council, or its Administration and Finance Committee, on adjustments to the program priorities, and on alternate income generating resources;~~

~~ii. Receive from the Executive Council, not less than four months prior to the meeting of General Convention, the proposed General Church Program for the upcoming triennium, including a proposed detailed Budget for the year next following that of such Convention;~~

~~iii. Meet in such places as it shall determine, sufficiently in advance of the next General Convention to expedite its work;~~

~~iv. Conduct hearings upon such proposed Program and Budget; and~~

~~v. Consider such proposed Program and Budget and report thereon to the next succeeding General Convention.~~

~~d. Not later than the third day prior to the adjournment of each regular meeting of the General Convention, the Joint Standing Committee shall report to a Joint Session, pursuant to Canon, a proposed Budget for The Episcopal Church for the ensuing Convention period, subject to the approval of the said Budgets subject also to increase, reduction, or elimination of items, based on open hearings held during the General Convention and by subsequent concurrent action by the House of Deputies and the House of Bishops.~~

Joint Rule of Order IV.14

~~IV: Supplemental Money Bills~~

14. ~~After the adoption of the Budget for The Episcopal Church, any resolution calling for the expenditure of any moneys (or containing implied funding) shall be unfunded.~~

Subsequent sections V - X should be renumbered.

Joint Rule of Order VII.21

VII.21.

a. The Joint Standing Committee on Nominations, through the Office of the Secretary of General Convention, will secure background checks on its and any other nominees for Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund. These background checks will cover criminal records checks and sexual offender registry checks in any state where a proposed nominee has resided during the prior seven (7) years, any appropriate professional licensing bodies with jurisdiction over a nominee's professional status and any violations of state or federal securities or banking laws. The records checks of proposed nominees from outside the United States will cover the same information from comparable authorities in the place of principal residence of the proposed nominee.

b. The required background check will be done prior to accepting a proposed nomination.

c. Background check results will be reviewed by the Office of the Secretary of General Convention. If that Office, after consultation with the Chief Legal Officer, determines that the results should preclude a person from holding the office sought, the Office shall share the determination with the proposed nominee and remit that determination, but not the background check results, to the nominating authority. Background check information shall not be shared beyond the Office of the Secretary of General Convention, the Chief Legal Officer, and proposed nominees who request their own information. The cost of background checks under this rule shall be covered by ~~the General Convention~~ *The Episcopal Church* budget.

EXPLANATION

Canon I.1.2.m

If the elimination of the Joint Standing Committee on Program, Budget and Finance is adopted, then these revisions to Canon I.1.2.m provide a helpful redundancy, or reminder, to Standing Commission, together with existing Canon I.1.2.k.3.

Canon I.1.2.o

The Task Force proposes to delete this canon here and move it, with small amendments, to a new Canon I.4.4. This subsection was added to the canons in 2018. It was proposed by the Standing Commission on Structure, Governance and Constitution and Canons with the following explanation: "This change permits task forces to be created and commence prior to the first meeting of Executive

Council, allowing them more time in the triennium to do their work." Since the subsection calls on the Presiding Officers to review all General Convention resolutions calling for "study or further action" and to recommend to the Executive Council the bodies they believe necessary to carry out the work; and for the Executive Council to act on such recommendations, including providing funding, it makes more sense for this provision to be in the canon on the Executive Council, Canon I.4.

Canon I.1.8

These amendments implement a generic, uniform title for the triennial budget of the Church, "The Episcopal Church budget," and requires dioceses to pay their assessments, not all on January 1 of each year, but according to the schedule (currently monthly) established by Executive Council.

Canon I.1.9

These amendments (i) state that the Treasurer's borrowing is on behalf of Executive Council, the governing body with authority between General Conventions; (ii) conform the title of the budget as explained above under Canon I.1.8; and (iii) clarify that any borrowing requires the approval of Executive Council, of which the Presiding Bishop, under Canon I.4.2.a, is the Chair and chief executive officer.

Canon I.1.11

The Task Force's proposed amendments to Canon I.4.6 make clear that Executive Council would have the sole authority to propose the triennial budget to the General Convention. Accordingly, there would be no need for the Treasurer to also propose the same budget. (Note that the remaining three sections of Canon I.1.11 will need to be renumbered.)

Canon I.1.13

This amendment conforms the title of the triennial budget as noted above under Canon I.1.8. It also deletes an outdated reference to the "Expense" budget.

Canon I.2.6

These amendments conform Canon I.2.6 to the Task Force's other proposed canonical amendments establishing the Executive Council as the Church governing body that submits a proposed triennial budget to the General Convention, and cross-references that canon.

Canon I.2.8

Consistent with prior proposed amendments, above, this change deletes the reference to the Joint Standing Commission on Program, Budget, and Finance.

Canon I.4.3

This amendment is consistent with the Task Force's recommendation to transfer all responsibilities of the Joint Standing Committee on Program, Budget, and Finance to the Executive Council, thereby eliminating the need for that Joint Standing Committee.

Canon I.4.4

As explained regarding the deletion of Canon I.1.2.o, since this canon calls on the Presiding Officers to recommend to the Executive Council the creation of various bodies to carry out the work specified by the General Convention, and for the Executive Council to allocate the funds for such work, it makes more sense to include this provision in the canon on the Executive Council than in the canon on the General Convention. The text of subsection o was moved in its entirety with the only change being to change “Presiding Bishop” to “Chair” and “President of the House of Deputies” to “Vice-Chair,” the titles they hold in their roles in the Executive Council.

Canon I.4.6.a, c and i

These amendments further implement the Task Force’s recommendation to have the Executive Council submit the proposed triennial budget to the General Convention, specifically to the Secretary of the General Convention. The changes also delete a redundant subsection requiring the Treasurer to also submit the proposed budget, and clarifies that the budget operates on a calendar year. The amendments strike current subsection c; for many years, once released the proposed budget has been distributed to the entire Church, making it unnecessary to direct Executive Council to send it to all Bishops and Provinces. Finally, the mention in subsection i of the Joint Standing Committee on Program, Budget and Finance should be struck.

Canon I.5.5

The Task Force concluded that the concept of sharing the Archives’ expenses between the General Convention and the Executive Council is outdated. The triennial budget makes an appropriation for the Archives, and the canon need not mention any sharing of expenses., as there is no difference between the "Executive Council budget" and the "General Convention budget." The Task Force's recommendation is to use throughout the canons and Rules of order the term, The Episcopal Church budget.

Canon I.9.10

This canon was adopted in 1928 and has been little used, according to the Annotated Constitution and Canons (White & Dykman). A Province that sought to take over the implementation of a General Convention-funded program could propose a plan for that to the Executive Council, which could take action to support the request, on a case by case basis with full access to the facts. The Task Force believes this canon is no longer needed and in addition seems arcane.

House of Bishops Rule V.D.d

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this Rule of Order is no longer necessary.

House of Bishops Rule VIII.I

This amendment implements a generic, uniform title for the triennial budget of the Church, "The Episcopal Church budget."

House of Deputies Rule of Order VI.C.3.v.a

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this House of Deputies Rule of Order is no longer necessary.

House of Deputies Rule of Order IX.A.1.ii.a.1

This Resolution Review Committee "budget impact" task will no longer be necessary under the structure and sequencing of the Task Force's recommendations.

Joint Rule of Order II.10

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this Joint Rule of Order is no longer necessary. (Note that the deletion of this Joint Rule of Order will require the succeeding Joint Rules of Order to be renumbered.)

Joint Rule of Order IV.14

The Task Force proposes to change the budgeting process for the triennial Episcopal Church budget so that after General Convention a budget committee of the Executive Council will review all resolutions adopted by the General Convention, especially those with budget implications and those setting the priorities for the Church, and make recommendations to the Executive Council for appropriate revisions of the budget adopted by the General Convention. Therefore, it would no longer be the case that resolutions adopted after adoption of the triennial budget would never be funded. In fact, such resolutions could be funded by Executive Council after it completes its post-General Convention review of all adopted resolutions to see if they should be funded by the triennial budget finalized by the Executive Council.

Joint Rule of Order VII.21

This is another amendment conforming the title of the budget to "The Episcopal Church" budget.

Supplemental Materials

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Appendix I

The Current Budget Process and its Disadvantages

The Current Process

PB&F is established in Joint Rules of Order II.10 (page 346 of the Constitution, Canons and Rules of Order publication), with representative membership of 27 Bishops and Deputies appointed by the Presiding Officers. Additional DFMS staff support brings the number of meeting attendees to 35-40.

Normally, PB&F has held two face-to-face plenary meetings, which necessarily involve a large expense. The first meeting, usually in the fall prior to General Convention, is primarily for educating its members (many of whom are new and inexperienced) on the body's canonical duties, the budgetary process, and the current triennial budget. The second pre-Convention meeting (normally in February) is where PB&F officially receives the proposed budget from the Executive Council (see Canon I.4.6(a)) and begins the difficult process of understanding the budget in detail. Throughout the triennium, one or more PB&F officers have customarily attended most Executive Council meetings, working primarily with the Executive Council's Finance Committee.

During General Convention, PB&F continues to meet and revise the proposed budget. Open hearings are held where people may address special requests or concerns. In addition, PB&F frequently invites particular people to address the Committee or a subcommittee. The Joint Rules of Order require that a final proposed budget be presented to a joint session no later than the third day prior to adjournment. To accommodate translation and formatting, the final proposed budget must be completed 24-48 hours before the joint session. The respective Houses thereafter vote on the budget.

Disadvantages of the Current Process

The Task Force sees significant disadvantages with the current process. Most significant is the requirement to approve a budget before all priorities of General Convention have been established. To allow enough time for formal presentation of the budget, followed by each house, one at a time, debating and voting on the budget, PB&F's work ends four or five days before the end of General Convention, which is the period most of the resolutions come out of committee and are sent to the floor of each house, one at a time, for debate and vote. Thus, the budget may not include the true priorities of General Convention.

Another significant disadvantage is the steep learning curve required by PB&F members. In a relatively short amount of time, they must comprehend the large and complex triennial budget, along with the extensive and detailed background knowledge needed to understand how and why each line item was included by Executive Council in the proposed budget. Additionally, the Church staff, after working throughout the triennium to help Executive Council members understand the line items in sufficient detail to make proper decisions, must now attempt to do the same thing all over again with PB&F members in a much shorter time period. The Church has been asking the impossible. In the time available, PB&F members cannot obtain the same amount of budgetary knowledge as the Executive Council finance committee members.

The current process is an inefficient, even wasteful, use of financial and personnel resources, which may not reflect the priorities of General Convention. Upon careful reflection and in consultation with past PB&F chairs and members along with staff, the Task Force believes a smaller body, adequately resourced, would be more productive and decisive. And upon further reflection, the Task Force believes that continuing the two-committee process itself is untenable.

TASK FORCE ON THEOLOGICAL EDUCATION NETWORKING

Membership

Ms. Sarah Stonesifer Boylan, *Chair*	Washington, III	2021
The Rt. Rev. David M. Reed, *Vice-Chair*	West Texas, VII	2021
The Rt. Rev. Lucinda Ashby	El Camino Real, VIII	2021
The Very Rev. Don Compier	Kansas, VII	2021
Ms. Amy Cook	California, VIII	2021
The Rev. Maureen-Elizabeth Hagen	Oregon, VIII	2021
Ms. Rebecca Hall	Texas, VII	2021
Ms. Karen Meridith	Tennessee, IV	2021
The Rev. Dr. Altagracia Perez-Bullard	New York, II	2021
The Rev. Kit Wang	Maine, I	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

2018-A022 Create a Formation Networking Team

Resolved, That the 79th General Convention authorize a Theological Education Networking Task Force with membership appointed by Presiding Officers consisting of four lay persons, one priest, one deacon, and one bishop who represent the cultural and theological diversity in the Church, be established to serve as a networking and informational referral hub for the discernment, development, and dissemination of theological education and formation resources for lay and clergy leaders in small congregations; and be it further

Resolved, That the Theological Education Networking Task Force collect, assemble, evaluate, and publicize to dioceses and congregations the resources currently offered across The Episcopal Church for the training of commissions on ministry and discernment committees to focus on the education, training, and formation of leaders who serve in small congregations with a special emphasis on alternative theological education pathways; and be it further

Resolved, That the Theological Education Networking Task Force work with the House of Bishops, through agencies such as the College for Bishops, and with the Presiding Bishop's office and dioceses in collecting, disseminating, and encouraging the use of resources and best practices for identifying, educating, and forming clergy and lay leaders of small congregations; and be it further

Resolved, That the Theological Education Networking Task Force submit to the Executive Council Joint Standing Committee on Local Ministry and Mission a quarterly written report of its activities and complete its work by the 80th General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $60,000 for the implementation of this resolution.

Summary of Work

Executive Summary

The Task Force faced a three-pronged request within the mandate. Tackling these resolutions created a need for prioritization and streamlining of what was actually possible based on the networking and information during the three-year timespan available to complete the work. The Task Force, collectively, addressed the need to differentiate our work versus that of the Task Force on Formation and Ministry of the Baptized, which convened with sometimes perceived overlapping mandates.

With many different seminaries, universities, dioceses and other entities providing opportunities for ordination-track education, it became clear that documenting that current, available information on the programs and tracks would take up the majority of the triennium. Varying types of offerings (discernment, for lay leaders, or ordination-track) vary among regions. Overall, the alternative formation programs address the localized needs of ministry leaders, creating a focus on the unique circumstances found in that supporting area. There is a lack of cross-pollination, and simply, data on what each program offers and how they are forming their future ordained leaders. Thus, theological education networking and information gathering became the main focus of the Task Force's work.

The Task Force spent several months determining the most important information points to gather, as well as how to go about doing that. Starting with the Task Force's networking and researching skills, the categories became clear: Episcopal seminaries, non-Episcopal seminaries with Anglican year, alternative formation programs, Iona Collaborative programs, and competencies.

Data from these categories' programs and initiatives were then put into a spreadsheet that organized based on name, place, sponsoring organization, contact information, training focus, website, cost, description, and other pertinent details. The Task Force did a preliminary review of all diocesan websites to pull information about possible formalized formation programs. After this initial review, the Task Force then asked the diocesan contacts to edit and provide feedback on their own information as well as any others that were not included. The last round of requests went to diocesan bishops and canons to the ordinary.

Survey Request

The review request, in English and Spanish, went to the formation program contacts as found by the initial Task Force membership. In June 2020, the General Convention Office sent out a survey that was open for approximately five weeks to solicit feedback and correct details. Sent to a targeted group of 122 formation program coordinators, requesting to provide better viewpoints and details of programs and resources. As a follow-up, the diocesan bishops and canons to the ordinary were asked to review the information and/or forward the survey request to the relevant respondent. Out of those requests, the task force received 38 responses from the GCO survey and then the group followed up with personal requests.

Survey Results

The overview of the Episcopal seminaries, non-Episcopal seminaries with Anglican year, alternative formation programs, Iona Collaborative programs, and competencies documented information for over 116 programs.

The datasheets include as much information as possible about programs found beyond the continental United States.

Find the link to the full data set here: http://bit.ly/TF_Education

Observations

The survey requests and information gathering went out during the first six months of the COVID-19 pandemic. As of writing this report in January 2021, the long-term impact of COVID-19 has yet to be fully understood on vocational formation programs and initiatives. The short-term shift has provided opportunities to learn and experience community and pedagogy in online systems. The experimentation happening in some programs has breathed new life into vocational education for students and instructors. A few programs have decided to wait until more “normal” in-person gatherings can resume. The fear is, much like community-based ministry, how will traditional and alternative education paths survive if they are not flexible to online communities and other ways of gathering?

The task force came to understand the more consistent need for exploring cross-pollination of students, instructors, platforms. Understanding that each program is unique for its own community context, what are the commonalities and overlaps that can be developed to create stronger ordination-track programs to promote community-building and skill-building? With the abundance of experience and trained teachers within local formation programs, there is the possibility of taking the best teachers and trainers and widening their impact and lessening the load within smaller, stretched programs.

Programs like CALL from Church Divinity School of the Pacific and Iona Collaborative housed at Seminary of the Southwest are heavily used across the Church. Relying on these adaptable offerings and curricula gives the main track of classes and foci to those vetted programs and teachers, allowing the local formation schools to shape contextual learning based on regional needs and initiatives.

With the increase of local, alternate formation programs, we are aware of varying standards and intensity of trainings offered. In 2020, the General Board of Examining Chaplains read 44 exams from candidates designated from local or alternate programs. This 2020 statistic is the first listed with this preparation option. In previous years, the General Board of Examining Chaplains included only “No Episcopal/Anglican Seminary”. In 2019, 52 exams fell into this category, an increase of 2 from the previous year. The exams in 2017, 38 candidates were under the “No Seminary” designation. This steady number, whereas other seminaries decreased, indicates the increasing use of local and alternate formation program options. As with all these statistics from the GBEC, these reports do not include those ordained whose dioceses do not require the GOEs. Beyond the GOEs, there is no agreed-upon standards across the church for ordination-track training programs.

Ultimately, does the efficacy of the formation programs result in a more diverse ordained leadership base that reflects the needs of the region? Or does it continually offer the same educational and formational experiences to the same group who is currently within ordained ministries? How do the parish and diocesan discernment processes accurately shift to raise up a wider population into discernment and then into ordination programs, whether traditional or alternative?

Proposed resolutions

A085 Creation Of A Digital Hub For Formation Resources (In English, Spanish, And French)

Resolved, the House of __________ concurring, that the 80th General Convention instruct Executive Council to implement the recommendations of the Task Force on Formation and Ministry of the Baptized and the Task Force on Theological Networking to develop a plan for a sustainable digital hub for Episcopalians to access formation resources for lay and ordained vocations; and be it further

Resolved, that Executive Council present a report with the plan (to include recommended structure, content, staffing, timeline, and budget) to the 81st General Convention; and be it further

Resolved, that $30,000 be budgeted for the work of developing this plan over the next triennium.

EXPLANATION

The Task Force on Formation and Ministry of the Baptized and the Task Force on Theological Networking are short-term solutions for work that needs to be on-going at a denominational level. This online hub would provide vetted resources for leaders to adapt for their contexts. The curation by subject-area experts gives the opportunity to uplift voices from around the Episcopal Church and Anglican Communion. Given the variety of situational needs, giving leaders a place to begin will set them off on the right path as they explore their own spiritual discernment, help to develop others' discernment process, or prepare for ordination formation could be.

This online hub will connect seekers of discernment resources with proven formation processes, materials, and networks to facilitate vocational development, without having to develop tools on their own. To uplift exemplars and alternative ministry models' development processes would give leaders a more expansive resource list as they nurture faith communities for an uncertain future.

Refer to the resolution explanation provided by The Task Force on Formation and Ministry of the Baptized for more information and details.

TASK FORCE ON THEOLOGY OF MONEY

Membership

The Rev. Evan Garner, *Chair*	Arkansas, VII	2021
The Rt. Rev. Kevin Brown, *Vice-Chair*	Delaware, III	2021
The Rev. Dr. Gawain de Leeuw	New York, II	2021
The Rev. Candice Frazer	Alabama, IV	2021
The Rt. Rev. Gayle Harris	Massachusetts, I	2021
The Rev. Gia Hayes-Martin	California, VIII	2021
Mr. W. B. McKeown	New York, II	2021
The Rev. Mary Beth Mills-Curran	Massachusetts, I	2021
The Rt. Rev. Kirk Smith	Arizona, VIII	2021
Dr. Steven Tomlinson	Texas, VII	2021
Ms. Celeste Ventura	El Camino Real, VIII	2021
Mr. Doug Walker	Florida, IV	2021
Ms. Erin Weber-Johnson	Minnesota, VI	2021
Mrs. Pamela Wesley Gomez	Connecticut, I	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rev. John F. Dwyer, resigned 2019
The Rt. Rev. Lawrence C. Provenzano, resigned 2020

Acknowledgements

Dr. Amy Thayer

Mandate

2018-A061 Create a Task Force on Theology of Money

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

Resolved, That the Task Force be directed to use scripture, approved liturgical resources, other theological texts, and previous actions of General Convention to summarize the ways in which The Episcopal Church understands the theology of money and financial resources in the way we give, invest, and spend; and be it further

Resolved, with regards to investment beliefs, that the Task Force should examine the following elements of responsible investing consistent with the Church's faith and mission as practiced today by many institutional investors across the Church: applying ethical guidelines in investment selection and management, shareholder activism, and investing for responsible social and environmental outcomes as well as financial return; and be it further

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

Resolved, That the Task Force be directed to make available its findings and recommendations as a resource to guide and inform policy on giving, spending, and investing across The Episcopal Church; and be it further

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

Summary of Work

Concerning Our Report

At the 79th General Convention, our task force was created and charged with summarizing the ways in which The Episcopal Church understands the theology of money and exploring the ways that institutional investors across the Church use particular methods for responsible investing. To accomplish our work, we met monthly on Zoom beginning in April 2019 for a total of nineteen virtual meetings plus subcommittee meetings. We interviewed representatives from dozens of congregations, dioceses, and other institutions throughout the church. And we conducted a survey of individuals' attitudes and beliefs about money.

We found several themes that are common throughout the Church: that the Church does have a claim about the use of money; that debt is of Christian concern; and that the nature of the Church's investments is important. We also noted the overall lack of theological resources available to guide congregations, dioceses, and other Church-wide leaders when they make decisions about their personal or organizational finances.

As a structure for our report on the Church's understanding of the theology of money, we use the Church's principal service of worship, the Holy Eucharist. Our liturgy is, at its core, an expression of the theology of gift and giver, of blessing and abundance. It has been said that all statements of the Church are essentially theological. Indeed, if the Church is the very Body of Christ manifest in this age, what we say and do as the Church reflects what we say and do and understand about God. We offer this report as a reflection of the Church's teachings about money from the past and as a structure for its continued work in this area. In each section, we raise some of the theological questions that we have encountered in our work, which we commend to the Church for further consideration.

The Word of God

Opening Acclamation: Defining the Community

Whether assembled in person or virtually, the Christian community is gathered together liturgically through call and response. In the words of the Opening Acclamation, we define ourselves as the ones who have come together to bless God and to proclaim the resurrection of God's Son. As the *ekklesia*, we have been called out of the wider community because of our pursuit of God's reign—the Kingdom we proclaim as blessed "now and forever."

That pursuit of the Kingdom of God guides the ways that we approach money. Our theology of money impacts our everyday decisions, including authority, administration, compensation and benefits, capital and long term investments, budgets, legacy giving, hospitality, our common life, the use of volunteers, and expressions of gratitude. Although we continue to live in a world in which wealth is aligned with power, we have been called into a community of people who seek to worship Jesus—the one who for our sakes became poor—and not Mammon. Even before we identify the forms that our ministries will take, we define ourselves as a community that must take clear and faithful and God-inspired positions on lending, sharing, tithing, investing, debt forgiveness, interdependence, materialism, and consumerism.

As we gather, we ask...

- What is Mammon?
- How does our encounter with money, finance, and economy animate and inform our pursuit of the Kingdom of God?
- To what extent do we come to church in search of a better god than Money?

Song of Praise: Acknowledging Our Creator

During the triennium, we invited representative individuals throughout the church to complete a survey about their own understanding of the theology of money. This survey was translated into multiple languages and sent out through the Episcopal News Service in order to capture the breadth of the Church. We received over six hundred responses, out of which several common themes emerged. One of those was a clear belief that money does not belong to humans; it belongs to God. Respondents indicated that, like other spiritual gifts, God gives us money as a tool to share as we undertake God's work in the world. This is the belief from which the Church's understanding of the theology of money emerges. As one respondent stated,

> Our Christian tradition holds that we should all have equal access to money and resources; that being wealthy does not confer a special status or reflect God's favor or the industry or intelligence; that God has a preferential option for the poor; that we live in a culture that demonizes the poor to support extraordinarily unequal and unfair access to resources; and that our primary task as the Body of Christ is to envision and pursue the realm of God, in which all are fed and love supplants power and wealth as primary values.

Just as the Gloria or other song of praise is sung at the beginning of our eucharistic liturgy to name the one to whom our praise is offered, we begin our theology of money with the belief that God is the giver of all good gifts and that all things belong to God.

As we praise God, we ask…

- Where do we believe our money comes from?
- How do we come to possess it?
- What kind of god gives us money?
- What sort of faith do our habits of spending, saving, working, and giving bear witness to?
- What beliefs ground our economic habits?

The Collect of the Day: A Theological Opportunity

In the liturgy, before the appointed scripture lessons are read, the presider focuses the congregation's attention and gives voice to the assembly's intentions by offering the Collect of the Day. Written to reflect the particular liturgical observance being undertaken, the Collect typically reflects one or more of the themes contained in the lessons. As such, it invites the assembly into theological engagement by collecting and uniting the various prayers of the congregation in anticipation of what will be proclaimed as God's Word.

We name in this report the urgent need for the Church to explicitly and intentionally engage its people in the work of the theology of money. Our survey revealed that, with the exception of annual stewardship campaigns, congregational leaders do not regularly discuss money, and, when they do, the ensuing conversations are commonly cloaked in secrecy and couched within the context of scarcity.

> First, [church leaders discuss money] with silence and secrecy. And hagiography for "the old days" when the parish had more members. There was a strong push for me to not know about the individual giving of parishioners—which is a luxury reserved for a parish without deficits, frankly. Second, with sabotaging stewardship campaigns—the two years before I arrived as their priest they had not successfully completed a stewardship campaign, and it had been 21 years since the last capital campaign. Third—with a good helping of fantasy and dependence on unrestricted gifts that they call "savings" even though they are not the result of excess money saved but of gifts from the past. The reality here and in our larger political reality is this: Deficits are very convenient things to allow especially the most conservative or the biggest givers to control what the parish does—and does not—do. Repeat that statement five times over. - Clergy Survey Participant

> Our congregation does not usually talk about money except toward the end of the year when some are worried about a pending deficit, or during the fall "stewardship campaign" when encouraging members to give more. The Vestry and other committees usually are talking about money from a sense of scarcity; the endowment committee often talks about it as if it were a sacred treasure to be protected for its own sake. I am not sure the Vestry talks theologically about their own stewardship and role in leadership regarding money. - Survey Participant

Nevertheless, despite the lack of direct theological engagement by clergy and lay leaders, survey respondents indicated a desire to use their money to respond to God's call. In other words, people are hungry for leadership in the area of faith and finances, and the Church must embrace the opportunity to collect those desires into resources for theological education.

As we pray, we ask…

- What prevents us from being transparent and open about money?
- How do Episcopal clergy systematically self-censor about money? What are we afraid of? What would we be saying if we were not afraid?
- What questions are parishioners asking that we do not have good answers for?
- Where might engaging the theology of money and richer practices of stewardship respond to our congregants deeper theological aspirations?

The Lessons: Underused Scriptural Resources

The scriptures are full of stories, commandments, and examples of how God's people are called to use the financial resources entrusted to them by God. Our survey showed that the people of our Church are familiar with passages like The Widow's Mite (Luke 21:1-4), The Eye of a Needle (Mark 10:24-27), Where Your Treasure Is There Will Your Heart be Also (Matthew 6:21), and The Love of

Money Is a Root of All Kinds of Evil (1 Timothy 6:10). Although less commonly cited, respondents also identified passages like To Whom Much is Given, Much Will be Required (Luke 12:48), No One Can Serve Two Masters (Matthew 6:24), Lay Not Up For Yourselves Treasures Upon Earth (Matthew 6:19-20), and passages about jubilee (e.g. Leviticus 25:1-4). Such recollections represented substantial theological engagement.

> [I remember] the most often misquoted: "For the love of money is the root of all evil." It is important to understand that money—in and of itself—is not evil. It is a means of economic exchange. It is a valuation placed on our work. I value my work and expect my employer to also value my work. I value the work of the person who repairs my car, the person who cooks or serves a meal to me, the people who taught my children. It is only when money becomes the end in itself—simply a scorecard in a game of conspicuous consumption—that love of money is evil. - Survey Participant

> I don't use biblical texts, not because the texts are bad, but because they come so larded with other people's ingrained interpretations of them. I use Sadi's parable about the fox and the tiger often. - Survey Participant

There are many more passages from the Bible that speak to the theology of money, and the survey demonstrated a clear association of financial resources with scripture. That survey respondents were able to name so many is a sign that the lack of conversations about money in parishes does not necessarily indicate an absence of theological formation among those in the pews. On the contrary, scripture provides a ready and accessible foundation for the Church's teaching on the theology of money. We believe that the Church needs to develop teaching resources that build upon that foundation by connecting passages from the Bible with the practical situations that individuals and parishes face.

As we hear God's Word, we ask…

- What difference does the Christian faith make in economic practice?
- What values are we expressing in how we spend, save, earn, and otherwise use our money?
- How are we teaching people how and why to give?

The Sermon: The Church's (Missing) Proclamation

Sermons are opportunities for practical theology—the integration of our faith and practice. Although the sermon is the principal opportunity for clergy to break open the Word of God for the congregation, our survey results show that, with regard to money, clergy are not doing so. This may be from fear of criticism that "the church is always talking about money" or from embarrassment at their own unwillingness to be a model of generosity. Accordingly, respondents indicated that theological formation in the area of finance comes from family members, particularly parents and grandparents. Again, the Church must capitalize on the opportunity to build upon the domestic formation that does take place and begin to teach its people about the theology of money.

> We were poor and were taught to NEVER ask for gifts. I don't even ask now. - Survey Participant

> I participated in a HIV/AIDS fundraiser walk that required solicitation and support of friends, family, and my community. I suppose I still think of it in terms of how generously people responded when asked (which is not necessarily what I was expecting). - Survey Participant

Our survey named older family members, especially those who lived during the Great Depression, as primary resources for that formation. The Church could offer intergenerational programs that highlight the ways in which our collective theology of money has been shaped by the experiences of different generations, but it must do so with haste. Whether in preaching, teaching, or other methods of proclamation, leaders in the church, both lay and ordained, must address people's hunger for expressing deep value and meaning through their financial lives.

As God's Word is broken open, we ask…

- What opportunity are we missing when we fail to preach and teach about money in our churches?
- Where are we finding opportunities to make administration of the shared resources of our common life occasions for Christian formation and witness?
- In what important ways is the economy of the church materially different from the economies of other institutions in our culture?
- What obstacles prevent us from building a common inheritance?
- What obligations do we have to those who came before us and will come after us—to the Communion of Saints?
- How are we connected to and in conversation with the Communion of Saints across time?

The Creed: The People's Faithful Response

In our liturgy, the Nicene Creed is part of the congregation's response to the proclaimed Word of God. It is a response to what we have heard about God and Jesus Christ in the lessons and in the sermon, and it expresses both the congregation's participation in the shared faith of the universal Church and their desire for continued formation in the Way of Jesus.

Despite the overall lack of financial formation in the Church, our task force identified several ways in which the institutions of the Church, including the General Convention, the Constitution and Canons, and the *Book of Common Prayer* express convictions about money. Repeatedly, the General Convention has expressed its understanding of the theology of money through resolutions that support debt justice, fruitful stewardship, administrative competence, and worldwide mission. The Church claims that money is to be used in the service of Christ. To this end, the right use of money requires formation.

The Canons affirm the importance of forming disciples "concerning Christian stewardship," including "the biblical standard of the tithe" (III.9.6.b.2), and the role of vestries in the care of the "corporate property" of parishes (I.14.2). In addition to the eucharistic liturgy, the *Book of Common Prayer*, through its intercessions and collects, shapes our expectations of money and our power over it.

We also note, especially during the Covid-19 pandemic, that individual congregations continue to find new ways to transform the financial resources entrusted to them into expressions of security in times of vulnerability, hope in situations of lack, and joy in the midst of scarcity. Behind every mission and program that requires the allocation of parish resources is a presumed theology of money, which may or may not be made explicit by the leaders and members of the congregation. When those theological connections and teachings remain unexpressed, the financial decisions can reflect a theology that is contrary to the teaching of the Church.

> When things get tight per my way of looking at finances, I pray for help in managing what I have or figuring out how to make things work out the way "I think" they should. I don't recall just praying for more money. I have always had enough to cover the basic needs for my family and realize that I am very fortunate that I can say that. Praying for guidance to be a better steward of the great bounty I have been given. - Survey Participant

> YES, yes, yes! I pray for wisdom. I pray for enough hours of work and maybe even a raise to be able to support my family better. I give thanks for my house being paid for, especially when I couldn't make the payments. I pray for ways I can help others. I give thanks that my parents and my church are good money managers. I pray that this year there will not be a money-draining disaster. - Survey Participant

As we respond in faith, we ask…

- What does Christ require of people with power?
- How can our money serve others in the spirit of Jesus?
- What obligation do we have to discern the individual and systemic effects of our economic actions on others?
- What is our responsibility to the needs of others, including the selfish and ungrateful?
- How do the needs of others create an opportunity to discern our salvation in Christ?
- What do our practices around money tell us about what we think about it?
- How does our stewardship of money express the values of our community and our view of the future?

The Prayers of the People: Opportunity for Missional Focus

In the eucharistic liturgy, another response to the proclaimed Word of God is the Prayers of the People—an outward-focused, missional, and practical expression of the consequences of what we believe. In our prayers, we hold before God the needs of all creation, especially those of the Church, those in civil authority, the welfare of the world, the concerns of the local community, those who suffer or are in any trouble, and the departed (BCP p. 383). Those prayers are not merely wishful thoughts for those we love. They are an expression of our faith—loving responses that grow from our fervent belief that God cares for and saves those in need. Not surprisingly, the respondents to our survey expressed ways in which they understood the theology of money to be expressed primarily in caring for those in need.

> Yes. We give thanks for the blessings that we have—especially now during this coronavirus period when so many people are out of work. We have a steady retirement income, a roof over our heads, enough to pay our utilities, and the ability to help others who may not be so fortunate at the moment. I pray that God will help us be good stewards of his bounty. - Survey Participant

Individuals reported that generosity in any form is a means of giving to God, particularly when those generous acts contribute to the needs of others. Respondents named giving as a privilege and, as a spiritual practice like prayer, acknowledged a desire to continually give more each time they are called to do so. Interestingly, very few respondents indicated that they pray for or about money except when seeking God's guidance for stewardship as an opportunity to increase their generosity toward others. Gratitude for financial resources was named as a common way that people included money in their prayers.

The congregations and dioceses of the Church engage in many programs that express an implicit understanding of the theology of money, including jubilee proposals, the purchase and forgiveness of medical and other debts, direct financial assistance to the poor, and microlending programs. As we note below, there are many institutional investors across the Church that are making investment decisions that reflect their commitment to economic justice. These are, at their core, responses to what we believe about God and money, but the Church is failing to make explicit the connection between those practices and the underlying theology. In addition to teaching and preaching, the Church can use prayer as a means to connect belief and practice by stating God's vision for our economic reality and seeking God's help in living into that vision.

As we hold the needs of the world before God, we ask…

- How does our understanding of the common good orient our investments or purchases?
- How does the way we hire, manage, and pay staff reflect the Christian faith?
- How does money express the value of time or work?
- How do we negotiate the tension between eschatological aspiration and practical, daily necessity?

The Confession: Acknowledging the Church's Failures

As defined in the Catechism, "Sin is the seeking of our own will instead of the will of God, thus distorting our relationship with God, with other people, and with all creation" (BCP p. 848). In the liturgy, we confess our sins "in thought, word, and deed, by what we have done, and by what we have left undone" (BCP p. 360). With regard to our use of money and our acceptance of and participation in systems that create and sustain inequality, the Church must confess its sin and must confront the sin of our wider culture.

Many respondents to our survey indicated that money has produced obstacles that mitigate or prevent them from living out God's purposes. More specifically, those who live in the United States reported that the realities of living within a culture that highly values income and wealth creates a personal need to hoard financial resources for fear of scarcity and/or decline. In turn, that reduces the amount and frequency with which those individuals make charitable gifts, including to those causes and institutions that implement God's work. Again, those results show a desire among the people for a proclamation of the theology of money that transcends the culture of scarcity in which the world acts.

> I sometimes think I've made too many compromises for the sake of comfort. It has confounded my ability to make real friendships across economic classes. - Survey Participant

> Money is also a source of anxiety, especially in an out-of-control, artificially expensive economy. Especially as we grow older, the anxiety or fear of running out of money is very real. Sometimes a sense of "this is a limited resource" hinders participation in work that one would like to do or take a pass on opportunities that seem too expensive at the time. The scale of the economy and cost of living distorts the importance, value, and possibilities of money. Too many things just cost too much and that impacts obtaining basic necessities. - Survey Participant

Additionally, we must lift up one glaring lack in this current report that requires further study by the Church. No theology of money can be written by The Episcopal Church without recognizing how its physical and economic structures were built upon the financialization and productivity of black bodies through forced labor. Such a history will most likely reveal the uncomfortable connection between international markets, the accumulation of wealth, and the violence required to constrain the free movement and organization of mainly black people during the colonization of the Americas. Historically, we are a Church of the wealthy and the elite. Many of our church buildings were built by enslaved human beings. Much of our generational wealth, including parish, diocesan, and institutional endowments, was amassed at the expense of human capital. Black bodies were used as collateral, as debt and credit, as numbers on a balance sheet.

That bodies can be used as numbers illuminates the sin and brokenness at the heart of this project, but it may be time for us to enter into deeper conversations about what slavery itself tells us about money and our relationship to it. It may also give us a better sense of what alternatives may await us when we consider our own responsibility to future generations and our life together. Our reliance upon money as an expression of power has shaped the culture of our Church in innumerable ways. Some parishes, dioceses, and other institutions have begun to address that legacy of sin in tangible ways. Most have not. The process of developing intentional teachings on the theology of money provides an opportunity for the Church to confess those sins of the past and present. It is a work that we must pursue, an act of repentance that we must accept.

As we confess our sins, we ask…

- How do our economic practices liberate or enslave us?
- Where do our investments facilitate injustice that we are otherwise opposing?
- What investments that oppose injustice will have the broadest support?
- How are we using the power we have to influence actors in unjust systems?
- How do we discern when to engage and when to divest?
- How do we talk about our participation in a system we cannot yet "afford" to leave?
- How does our wealth affect or reflect our risk tolerance?

The Peace: In Pursuit of Meaningful Reconciliation

As the congregation prepares to share Communion with God and each other, the passing of the Peace is a symbolic way for those who have gathered to express their unity in reciprocal ways. As Jesus taught in Matthew 5:23-24, if you are offering your gift at the altar and remember that a sibling has anything against you, you should first be reconciled before offering your gift. In that way, the Peace is a means by which the people affirm their status as reconciled to one another before sharing Holy Communion. As one survey participant expressed, "I pray for a spirit of generosity for me, my people, and all my parishes."

As the Peace emphasizes, spiritual reconciliation is not possible if physical or financial reconciliation has not been pursued. In order to promote that reconciliation, the Church must address the tension between our practical and aspirational intentions around wealth. We cannot proclaim Jesus Christ as the one who has come to reconcile us to God and to one another if we are not following his Way of reconciliation as individuals, congregations, dioceses, and institutions.

As we share the Peace, we ask…

- How do our economic practices help us build relationships?
- How should a diocese arrange the sharing of resources between churches?
- What responsibility do we bear for injustices done in the past?

The Holy Communion

The Offertory: Examples of Aligning Money and Mission

When we pass the alms basins or offering plates or, in pandemic times, put out a basket or solicit online contributions, we invite individuals to decide what part of their God-given bounty they will share with the Christian community. Although not the only economic moment of the eucharistic liturgy, the offertory is the one moment when money, along with other the gifts that are presented at the altar, becomes the focus. The Canons assume that money is a part of the fabric of our common life, and the Offertory is an opportunity for everyone to contribute (I.6-7). For each person or household, this is an opportunity to express what one believes through one's actions.

In our work, we interviewed representatives of more than a dozen institutions that invest their financial resources in ways that intentionally express the faith and mission of the Church. They include parishes of various sizes and dioceses from across the country. Each one has a different story of how they integrate faith and investing while not only preserving their fiduciary obligations but also furthering them as part of their Christian leadership. We share some of those stories here but include all of them in the "Investing as Doing Theology" report which can be found in the supplemental materials section of this report.

Churches as diverse as Ascension in Hickory, NC; All Saints in Pasadena, CA; St. Bartholomew's in Baltimore, MD; and Trinity in Indianapolis, IN; have committed to applying analysis of environmental, social, and governance (ESG) factors in order to manage their assets faithfully. Indeed, almost all of the parishes and dioceses we interviewed apply ESG.

In four of the institutions we interviewed, fossil fuel divestment was a catalyst for changing investment practices, but those institutions soon moved beyond that one issue. Divestment as a strategy was not abandoned, but, in these four cases, the focus shifted to affirmative investing in order to support positive change on a range of concerns consistent with the Church's faith. For example, All Saints', Pasadena, partnered with the Church Investment Group to create a new multi-asset fund, which takes into account positive environmental practices, resource efficiency, sustainable business practices, strong corporate governance, good relationships with stakeholders, and other activities that enhance the long-term sustainability of its investments.

Similarly, the Diocese of Oregon created a new socially responsible investment fund for parishes and other institutional investors in the diocese. Through its diocesan convention, the diocese has established a list of Gospel-focused affirmative investing priorities for the new fund as well as a list of negative priorities that should be avoided.

Some of the parishes and dioceses we examined have pursued opportunities for investing directly in communities locally and abroad. For example, St. James in Black Mountain, NC, decided to shift its cash assets from a traditional bank to a local credit union that was committed to community development and lending to underserved populations in Appalachia. At St. Stephen's of Ridgefield, CT, the youth used parish resources to make microloans in developing countries.

All of these examples show that the administration of the Church's investments is theological practice. A theology of money recognizes money does not move itself but is directed and guided through institutions that identify and clarify their values and are implemented by real persons with consciences. In short, money cannot be divorced from the institutions that direct them. There is no commerce, no market, no exchange without people directing them, guided by their structural practices; therefore, the care of how we manage our investments implies that administration reflects that money should be under the care of theological priorities.

These examples show ways in which the Church believes that investments should reflect its faith commitments. This includes mission statements, core values, and focused projects that an institution might take, such as building a credit union or a community development financial institution that builds housing. This, taken in itself, is a remarkable claim. That investments should reflect our faith is in stark contrast with the dominant view in the marketplace, that the sole purpose of money is to create more of itself.

While the two may be complementary in practice, they reflect two different foundational dispositions toward the nature of money. When faith directs money, priority is given to the One who is the source of worship—God. If money is to be solely its own criteria for movement, then the institutional focus may not be the values of the Church but whatever money seeks—Mammon.

We can observe examples of how the Church, through its congregations, dioceses, and other institutions, has responded to the Spirit's movement in broad categories. The examples we highlight are not exhaustive, as there are many different ways that individual communities direct their resources, but we can say that the Spirit is guiding the Church in both general and particular ways through the faith-guided financial decisions that religious communities make.

The Church's participation in environmental stewardship through responsible investing is another example. By spending its money on behalf of saving the planet, the Church affirms its belief that the world matters. This is congruent with our incarnational theology of the world and the biblical affirmation of the earth's bounty as a gift from God.

In 2015, the Anglican Communion Environmental Network, a group of sixteen Anglican bishops whose people and dioceses around the globe were threatened by climate change, wrote in the *The World Is Our Host*,

> We call for a review of our churches' investment practices with a view to supporting environmental sustainability and justice by divesting from industries involved primarily in the extraction or distribution of fossil fuels.
>
> We call for the strengthening of ethical investment guidelines to include consideration of justice for the non-human creation as well as the interests of future generations of humanity…the climate change crisis is the most urgent moral issue of our day.

The Church has also used the tools of proxy voting, divestment, and long-term social investment as expressions of faith. Since the late 1960s, when Episcopal churches challenged Kodak to hire African Americans in Rochester, New York, and fought for divestment from South Africa, Episcopal Church bodies have played a role in harnessing their investments as a form of economic power. In some cases, such as gun manufacturing, they have become proxies to demand actions. In others, like fossil fuels, they have divested to invest in cleaner sorts of energy. And in other cases, they have invested in entrepreneurship.

The Church believes that money can be used to enhance its prophetic witness for the sake of the gospel. It can be used to force institutions to uphold their values in the case of proxy voting or make a statement of public value in case of divestment. It can seek to share its economic power through funding entrepreneurs, credit unions, or community development funds. As a Church, we have demonstrated our belief that money is a legitimate form of institutional power to be used on behalf of Christ.

The Church affirms a diversity in investments that accounts for local needs. We see Christ in the particular lives of individuals who will better thrive through the praise and support of the fuller body. Local investments signify the dependence and interdependence we have upon one another, providing manna that individuals need to be sustained on the journey. The money we have is to be used to develop the true currency we have: the bodies of the faithful for the sake of the greater body. Money is for the purpose of developing people who are fully alive in Jesus Christ.

The Great Thanksgiving: Celebrating God's Saving Work

The Eucharist is the principal act of Christian worship and expresses our thanksgiving and praise for God's saving work in Jesus Christ. In the Great Thanksgiving, we recall in particular Christ's death and resurrection and the new life of freedom and flourishing that God conveys to us through the paschal mystery. In the Lord's Prayer, we ask repetitively that God would give us today our daily bread. We proclaim our commitment to forgiving the trespasses (literally "debts") of others as we ourselves have been forgiven.

One survey respondent, whose congregation does discuss money, named the ways in which the Eucharist reflects God's economic vision:

> Sacramentally, the question is, "How do we use our money to fulfill our baptismal vows individually and corporately?" Then we give thanks for the Eucharist, which feeds us to participate in God and for the gifts God gives us for that work, including money.

In a few congregations, this connection between the Eucharist and the theology of money is being expressed. In others, even when that connection is not named, the celebration of the Eucharist provides an opportunity for intentional theological formation around the theology of money.

The Breaking of Bread: Distribution of Resources

Communion is not a celebration or mystery to be observed but one in which the people participate. The one bread is broken and shared so that the people can be united with God and with each other through Christ. We eat the Body of Christ and, in so doing, become more fully the Body of Christ. As with any resource, how that spiritual food is distributed to the people is itself an expression of theology.

Participants in our survey expressed their understanding that money, while impermanent, is in abundance. Given that they also named the culture of scarcity in which they live, that perception of abundance is a statement of faith and names something of spiritual value. The Bible is replete with examples of how the community of faith is called to redistribute that abundance to ensure that everyone is given enough. The Church's Jubilee centers are examples of ministries that seek to redistribute the community's resources so that the poor have enough.

As we receive the elements, we ask…

- How much is enough?
- How does the idea of enough or of sufficiency speak to our salvation in Christ?
- How do we distinguish between needs and wants?
- How do we discern the needs of other congregations in our dioceses?
- How might we discuss each other's needs in the spirit of Jesus?

The Dismissal: Equipped for Service

In the eucharistic liturgy, the dismissal is an integral part of the service. The people of God have been nourished spiritually to do the work God is giving them to do. In many ways, that work takes the form of financial considerations—budgets and bills, debt and investment, giving campaigns and capital improvements, clergy compensation and diocesan assessments. Each of these invites us to apply our theology of money.

We conclude our report by acknowledging that there is much work left to be done. Our mandate was to summarize the ways in which the Church understands the theology of money and to report on the specific ways that institutional investors use techniques for socially responsible investing. In doing so, we have raised as many questions as we have answered. We believe that the Church in every manifestation—individuals, households, parishes, dioceses, institutions, and the denomination as a whole—repeatedly expresses through its decisions its various theologies of money. Although as numerous as the contexts and experiences in which the Church is found, those expressions grow out of a shared faith. At this point in the life of the Church, we have not done enough to articulate those common themes and to form our people in the way of financial discipleship, but the Church is not starting from scratch. Now the Church must take advantage of that faithfulness and commit to the formation of disciples by teaching and proclaiming its theology of money.

As we depart, we ask…

- How does what we believe about God and express through the liturgy of the Church impact our daily lives as individuals and as congregations?
- How does money impact vocational discernment and following our call?
- How does our wealth affect or reflect our risk tolerance?

Coffee Hour: Survey of Emerging Money Narratives, Executive Summary by Dr. Amy Thayer

This report shares the findings about Episcopalians' attitudes and perceptions about money as well as the role currency plays within their lives, parish, and Church. The findings presented are representative of a convenience sample of approximately 600 respondents (n=604) with an association with The Episcopal Church.

The most common words associated with money were cash, security and the realization that money is a necessity. However, other important associations included resources, power and wealth as well as save/saving and give/giving. These words proved to be important guideposts, as they were often prominent concepts within participants' subsequent responses.

Family (of origin) members appear to have had the greatest impact on participants' relationships with money. Respondents recalled learning lessons about how to earn, budget, responsibly spend and unselfishly give to others. Moreover, most respondents indicated that money allows them the freedom of choice in how to live into God's calling, which was manifest in three primary ways—becoming educated and/or modifying one's career, giving to others and serving God through the Church/church. However, this calling is often achieved only after attending to individual and familial basic needs.

While money has afforded respondents many opportunities, it has also served as a barrier that has precluded them from achieving their full potentiality. Many respondents indicated that money has produced obstacles that mitigate or prevent them from living God's purpose. More specifically, the realities of living within a culture (the U.S., in particular) that highly values income and wealth, and therefore fosters a need to follow and collect money for fear of scarcity and/or decline, reduces the amount and the frequency with which individuals give charitably—including to causes and institutions that implement God's work.

When detailing what they wished others knew about money, respondents indicated that money does not belong to humans; it belongs to God and it is a tool to share through doing His work. Participants also remarked that money should be recognized as one approach in supporting the church—but not the only approach, because the best use of money was when it was given alongside other resources, such as time and talent, which were viewed as equally valuable. Participants also stressed the importance of recognizing that money is in abundance, although it is often impermanent. Therefore, attention should be paid to budgeting, saving, circulating and building relationships with it, as that is the pathway to yield the most powerful outcomes.

Giving, for most participants began when they were children and was learned through discussions with or modeling by their parents; and, earliest experiences with giving was at church—both through Sunday offering and tithing. Giving in these ways taught most respondents the joy of giving freely and that generosity in any way is a means of giving to God—particularly when contributing to the needs of others, especially those individuals or groups that had less than they. Giving is a privilege and most participants indicated that they attempt to continually give more each time they are called to do so.

Many participants shared two common recollections from their earliest experiences of asking for a gift. First, they were taught and subsequently believe gifts should be given freely by the benefactor, and if something was requested, then it was not truly a gift. Secondly, respondents learned to place importance on understanding the recipient's gift preference(s) instead of assuming knowledge of what would be the most appreciated by the beneficiary. In addition, if they did ask for gifts, many participants indicated that often their requests were denied or reduced in scope because they were deemed undeserving. The result was increased hesitation to ask for gifts in the future. While these realities have occasionally made requesting gifts now more difficult, in combination, these experiences appear to have resulted in participants being more generous and increasingly willing to ask others to give/for gifts. Additionally, respondents indicated they have been more likely to give a gift before being asked for it. Moreover, respondents indicated that asking for gifts to help others (e.g., not themselves) significantly mitigates, even eliminates the burden and difficulty in asking, and inspires a joy in giving and pure generosity. Finally, participants recognized these ideologies represent the magnitude of relationships and companionship cultivated through giving.

With few exceptions, most participants readily shared scriptures that came to mind when talking about money. The most commonly used texts were The Widow's Mite and The Eye of the Needle, followed by For Where Your Treasure Is, There Will Your Heart be Also and For the Love of Money Is a Root of All Kinds of Evil. Other scripture cited included To Whom Much is Given, Much Will be Required; No One Can Serve Two Masters. Either You Will Hate the One and Love the Other, or You Will be Devoted to the One and Despise the Other. You Cannot Serve Both God and Money; Lay Not up for Yourselves Treasures Upon Earth, Where Moth and Rust Doth Corrupt; and, Jubilee.

Most respondents indicated that they did not or "usually" did not pray for money. However, among the respondents who indicated they prayed about money, even occasionally, the most commonly referred to reasons included guided stewardship—that is requesting assistance for directed and increased generosity to serve others who were experiencing less fortune, family members and less commonly, their parish. Participants commonly also offered prayers to give thanks for their favorable financial situations. Other respondents indicated that they engaged in prayer to ask for continued sufficiency (non-scarcity) and/or to request reprieve from the anxiety that accompanies such concern(s). Very few participants noted that they specifically prayed for (more) money.

Finally, more frequently than not, respondents stated that their faith community rarely, if ever discussed money. When the topic was broached, most commonly it was generally in terms of stewardship—in relationship to stewardship and annual campaigns, specifically. Among faith communities that rarely talked about money, respondents revealed that the conversations were commonly cloaked in secrecy and couched within the context of scarcity. Conversely, respondents who indicated their faith communities did discuss money, asserted that the conversations were presented openly and were situated in frameworks of abundance and spiritual discipleship. Moreover, some respondents, irrespective of whether their faith communities discussed money or not, inquired why priests/rectors should be responsible for instigating and sustaining conversations about money, with a recognition that many clergy are not adequately skilled (e.g., are not educated about fundraising while in seminary) or do not have the appropriate personality (e.g., being more introspective and introverted and often uncomfortable with) to introduce and lead such discussions and related efforts, and therefore, may not be the appropriate individuals for this task.

Proposed resolutions

A070 Creating an Online Stewardship Collaborative

Resolved, The House of _____ concurring, That the 80th General Convention create an online collaborative of stewardship resources between Project Resource (a collaborative cooperative stewardship program co-created by The College of Bishops, The Development Office, and The Episcopal Church Foundation), The Episcopal Network of Stewardship (TENS), and The Office of Ethnic Ministries; and be it further

Resolved, That the collaborative expand existing offerings by facilitating the creation of stewardship materials by people of color and the development of online courses and virtual workshops on topics such as post-pandemic congregational stewardship and culturally appropriate theologies of giving in English, Spanish, and other languages; and be it further

Resolved, That the collaborative develop culturally and racially informed education materials for all candidates for holy orders on stewardship and the theology of money in English and in Spanish; and be it further

Resolved, That $150,000 be budgeted for the work of the collaborative over the next triennium.

EXPLANATION

The Task Force on the Theology of Money has noted the profound disconnect between our theology of money and our giving as Episcopalians. Moreover, there is a widespread reluctance in congregations to even address serious matters of stewardship formation and responsible investment, yet parishioners are asking for resources to help them make faith-based decisions for their congregations and for themselves. The desire and tools are there, but the coordination of the Church's stewardship resources is not.

We have also found that stewardship resources are typically created for and by members of white, dominant-culture settings. These resources fail to take into account financial wisdom, stewardship practices, and theological frameworks for understanding money that are shaped by and drawn out of non-white cultures and communities. Our work indicates that diverse resources for the development of these materials exist but would be strengthened through collaboration.

Measurables & Time Frame

The funding we propose would allow the coalition to create a clearing house for stewardship resources easily accessible online to all in the church. The website would provide, among other things, a highly visible virtual archive for related documents, a channel for live and recorded seminars and workshops, and a 24/7 forum for leaders of the church entrusted with stewardship issues on which they could share their questions and ideas.

This will also be available to give seminarians, those preparing for ordination, and those called to leadership positions in stewardship efforts a course-delivery platform for their education. In addition, it would help implement the call for increased training for those preparing for ordination in stewardship training.

This also saves the expense of funding a full-time stewardship officer for the Church. The advantage of working within existing organizations is the ability to create lean, cost-effective models of implementation. For example, the effectiveness of online communication has been widely demonstrated during the pandemic.

Finally, and most importantly, this funding would support the first-ever creation of resources in our Church for Christian communities of color as well as ongoing training throughout the year.

- An online platform will be created by representatives from each member of the coalition in Year 1
- Stewardship professionals of color will be hired to write curricula and provide trainings through Project Resource in Year 2
- Stewardship professionals of color will be hired to write stewardship bundles and annual programs to be distributed through TENS in Year 2
- Project Resource faculty will expand their training to include at least two-thirds of the dioceses across the Church in Year 3 (currently, over one-half have been trained)
- All candidates for holy orders will receive training and resources in stewardship and the theology of money in Year 3

A071 Amend Canons III.6.5, III.8.5, and III.10.1

Resolved, The House of ____ concurring, That the 80th General Convention, in support of the canonical requirement of rectors and priests-in-charge to ensure that all persons in their charge are instructed concerning Christian stewardship, amend Canon III.6.5.g as follows:

Can.III.6

Sec. 5. Preparation for Ordination

g. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
4. the Church's teaching on racism.
5. *Stewardship and the Church's theology of money.*

And be it further

Resolved, that Canon III.8.5.h be amended to as follows:

Can.III.8

Sec. 5. Preparation for Ordination

h. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.
4. the Church's teaching on racism.
5. *Stewardship and the Church's theology of money.*

And be it further

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

Can.III.10

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

c. evidence of training regarding

1. prevention of sexual misconduct.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
4. training regarding the Church's teaching on racism.
5. *Stewardship and the Church's theology of money.*

And be it further

Resolved, that such training shall be made available to all persons in this Church, both lay and ordained.

EXPLANATION

Canon III.9.6.b.2 assigns rectors and priests-in-charge the duty of ensuring that all persons in their charge are instructed concerning Christian stewardship. The ministry of deacons often involves the allocation of resources, a responsibility which should be informed by a Christian theology of money. Clergy of this Church, whether deacon or priest, often lack an understanding of stewardship and the theology of money which would enable them to fulfill their duties of stewardship education and the responsible use of God's gifts. In other words, we make clergy responsible for stewardship education but give them no tools with which to do it. This resolution would address this problem by requiring formation for all candidates for ordained ministry in the theology of money and stewardship. This training would be available to all members of this Church, much as anti-racism training is required for certain leadership roles yet may be taken by any Episcopalian.

A072 Commending Episcopal Examples of Responsible Investing

Resolved, the House of ____ concurring, That the 80th General Convention give thanks for and affirm the work and witness of these fifteen institutions as faithful and responsible investors and commend them to institutional investors across the Church as examples of how faithful and responsible investing can be done: Episcopal Relief and Development; All Saints Church, Pasadena, CA; The Episcopal Church of the Ascension, Hickory, NC; St. Bartholomew's Episcopal Church, Baltimore. MD; St. James Episcopal Church, Black Mountain, NC; St. Stephen's Episcopal Church, Ridgefield, CT; Trinity Episcopal Church, Indianapolis, IN; Trinity Church Wall Street, New York, NY; the Episcopal Diocese of California; the Episcopal Church in Connecticut; the Episcopal Diocese of Massachusetts; the Episcopal Diocese of Michigan; the Episcopal Diocese of New York; the Episcopal Diocese of Oregon; and the Episcopal Church in Vermont.

A073 Encouraging Faithful, Ethical, and Responsible Investing

Resolved, the House of ____ concurring, That the 80th General Convention affirm to all institutional investors in the Church the value and importance of faithful and ethical investing (defined as investing institutional assets consistently with the Church's faith and teachings and the Church's mission) and responsible investing (defined as addressing, ethical concerns for social, environmental and governance matters, including climate change and human rights); and be it further

Resolved, that all institutional investors in The Episcopal Church be encouraged to adopt faithful and ethical investing and responsible investing for their investment programs and portfolios and to manage their investment assets using the following elements of responsible investing: ethical and theological guidelines for investment selection and management; shareholder engagement, including voting proxies; and investing for responsible social and environmental outcomes as well as for financial return.

Supplemental Materials

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Task Force on Theology of Money
Subcommittee #3
Investing as Doing Theology

Investing as Doing Theology

The wealth of the church…must be at the disposal of God and be used for godly purpose.… A new learning for me was that that's not just about how the church spends its money, but it's also about how the church invests its money. …The reality is, you can actually accomplish social good in financially responsible ways. You just have to decide that you want to do it.

The Rt. Rev. Michael B. Curry, Bishop of the Diocese of North Carolina, discussing the decision of the Diocese to invest in Self-Help Credit Union, ENS, June 29, 2011

https://www.episcopalarchives.org/cgi-bin/ENS/ENSpress_release.pl?pr_number=062911-01

Introduction

In Resolution 2018-A061 General Convention instructed the Task Force on Theology of Money to "examine" the following three "elements of responsible investing" "practiced" "by many institutional investors across the Church": "[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return."

From the three "elements" identified we understand the term "responsible investing" to mean what often is called "socially responsible investing" or "socially and environmentally responsible investing," that is, addressing, in investing, concerns for social and environmental matters. For Church institutions, responding to such concerns is grounded in the Church's faith and teaching. Thus, examining the three elements named above is appropriate to an inquiry into theology and investing. Because Convention included all three elements, we understand Convention to use the term "responsible investing" in a broad or comprehensive sense.

The resolution gave the Task Force a specific task. The resolution directed us to look for theology of money in the practices, the *praxis*, of the Church. We were to report on what the Church does as an investor as it seeks to live into its faith, not to report on theories or abstract expressions. Thus, this report is about the Church's practice of theology as it does investing. We can say we are reporting about *doing responsible, faithful investing as doing theology*.

In the assignment we were given no specific content for a practical theology for investing, except that those stated "elements" were, or might be, relevant. Accordingly, we sought to discover and describe what the Church is doing, now, as it invests, by asking about those elements. To us that meant we were to seek out Church investor *stories*. Our method was to ask Church institutions what they were doing as they invested and how they reflected on that. We hoped the responses would teach us something about their theology of investing – or about how they were doing theology in their investing.

Below we report fifteen stories of Church institutions – principally parishes and dioceses – investing in faith. Some stories may seem rather complex, some rather simple. In these stories other Church institutions – and, we think, individuals – may find matters to consider and apply as they undertake their own efforts at the intersection of faith and investing.

The stories demonstrate that Episcopal Church institutions in fact self-consciously invest as Church institutions guided by their understanding of their faith, and, in doing so, they practice the three elements of responsible investing identified by Convention. The stories as a group also suggest that there is a movement in the Episcopal Church for responsible, faithful investing. The movement has not been organized or directed by any Church entity or body. Nevertheless, we may say it appears institutional investors across the Church are moving with purpose along a common path, as faithful and responsible investors.

Finally, these stories show that the people who make these institutions run take seriously their responsibilities as people of faith. The people and the institutions work to be good stewards. As stewards, they seek to protect against financial loss and achieve needed financial returns. But also, as stewards, they seek to assure that the worldly wealth of the Church is used for godly purpose – that, through financially, socially and environmentally responsible investing, the Church applies its assets, in faith, to preach the Gospel.

Investing as Doing Theology

Observations

> *Resolved, with regards to investment beliefs, that the Task Force should examine the following elements of responsible investing consistent with the Church's faith and mission as practiced today by many institutional investors across the Church: [1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return.*
>
> Resolution 2018-A061

A movement in the Church

The charge given to the Task Force suggests General Convention sensed *a movement in the Church* for faithful investing. Such a perception may be correct. At least fifteen investors are moving along a path to engage in investing based in the Church's faith. Almost all these institutions follow approaches that encompass all three of the "elements" of responsible investing identified in Resolution A061: "[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return."

Until we collected these stories, we knew little of the scope of faithful investing by parishes and dioceses. Those we spoke with also seem to have known little about the others. Yet they share a commitment to investing faithfully and responsibly as institutions of the Episcopal Church.

Terms

In this report, "faithful investing" means seeking to follow one's faith as one invests. "Ethical investing" means applying ethical values. "Responsible investing" means addressing concerns for environmental and social matters when investing. In the last two decades, responsible investing has embraced using *environmental, social and governance* (*ESG*) analysis along with financial analysis in investing programs and decisions. Some suggest ESG is "value-free"; others say ESG brings non-financial values into investing. For both faithful investors and ethical investors, doing responsible investing or applying ESG necessarily leads them to apply their own values to investment decisions, whether those values are based in faith or not.

These stories are new

Ten or even five years ago, this report could not have been written. Almost all the institutions discussed here developed their faithful investing programs in the last decade. Most have reached significant implementation just in the last two or three years.

How many more stories are there? How did we find these stories?

We do not know how many Church institutional investors have been applying their faith in their investing. As far as we know, no Church body assembles and makes available information on investing by dioceses and parishes. Here we report on investors we found that had stories we thought could and should be shared.

We spoke with more than twice as many investors as we identify in this report. Some not discussed here may develop stories that can be shared. On the whole, those with stories we could tell had greater resources, in financial and human capital, than the others we have not discussed. Below we suggest the Church could make advice and support available to investors to help them, whatever their resources, to adopt and carry out faithful, responsible investing.

We found the investors we interviewed by direct contact, usually through prior knowledge or leads from others. The CEEP Network (Consortium of Endowed Episcopal Parishes or CEEP) has a few hundred endowed members. CEEP enabled a Task Force member to attend its 2020 Annual Gathering. The Task Force member was able to join a number of workshops and small group sessions on investing endowments and engage with about two dozen CEEP members. Interviews with two CEEP members also were facilitated by the Church Investment Group, a not for profit investment manager serving institutional investors related to TEC, including some CEEP members. Through these encounters we found six of the investors whose stories we tell. Task Force members knew five other investors directly or through personal contacts. We found Episcopal Relief and Development by a “cold” email inquiry. We were able to approach the remaining three investors whose stories we tell through the good offices of Amy Domini, a well-known responsible investing pioneer and a faithful Episcopalian.

We wrote up the stories, based on interviews and documents provided by the institutions, but each was reviewed and approved for inclusion in this report by the institution whose story it is.

How much of their assets do these investors commit?

All the institutions whose stories are set out below commit substantial assets to faithful investing, but the dioceses have acted differently from the congregations and parishes. All but one of the parishes and congregations have committed all their investment assets to responsible investing and substantially implemented their commitment. In contrast, only one diocese, the Diocese of New York, has committed all its investment assets, including those of its Diocesan Investment Trust, to faithful, responsible investing and fully implemented the commitment. Another, the Episcopal Church in Vermont, has adopted affirmative principles for all its assets and is working on implementing them. The Diocese of California invests all its assets with DFMS. The Diocese of Michigan invests all its assets passively, using only negative screens, which, however, in fact leads to some affirmative responsible investing outcomes. The other dioceses have committed a fraction but not all of their assets to responsible investing.

Who guides investment decisions?

All these Church institutions are guided and led by their clergy and their volunteer vestry, board and investment committee members. They receive investment services from outside investment advisors and managers, specialized consultants, and Outsourced Chief Investment Officers (OCIOs). An OCIO usually is an outside organization to which an asset-owner delegates management responsibility. Asset-owners define investment objectives and oversee the OCIO's performance, while the OCIO commonly helps choose the means to achieve objectives and executes the program. The amount of discretion delegated to an OCIO can vary.

Trinity Church Wall Street has an in-house Chief Investment Officer (CIO). A CIO is a corporate or institutional officer engaged to exercise high level executive responsibility in creating and managing an institution's portfolio(s). Before establishing its responsible investing program, Trinity engaged its CIO specifically to work with the investment committee, vestry and other leaders to create and then execute the program.

Community Investing, Impact Investing and the SDGs

The three "elements" named by Convention for us to examine are set out above. The third is *investing for responsible social and environmental outcomes as well as financial return*. Two terms commonly used for this sort of investing are "community investing" and "impact investing." Community investing involves investing at community scale, often through community development financial institutions. Impact investing involves larger scale and larger amounts, often through private capital arrangements with pools of millions of dollars.

The United Nations Sustainable Development Goals (SDGs) provide a framework that ethical investors can use, if they wish, to help guide their community investing and impact investing. Most think of the developing world when considering the SDGs, but the SDGs have a global reach: in the developed world, including the United States, much work remains to be done to achieve the SDGs. In 2015 the General Assembly adopted the SDGs, and in 2018 General Convention endorsed them. Convention asked Church institutions to devote 0.07% of their budgets to support the SDGs. As noted in its story below, the Diocese of Oregon allocates 0.7% of its responsible investing *portfolio* to investments in support of the SDGs. See the *Afterword*.

Three parishes and three dioceses discussed below began responsible investing through community investments outside their investment portfolios as such. Often, they provided capital for people in developing countries, whether or not they focused on the SDGs. The story of St. Stephen's Church, below, shows that: through a parish program, its youth did community investing by making microloans to people in developing countries to help them finance small businesses. The youth did the work and put up some of their own money, to which the vestry added more. Soon St. Stephen's leaders saw the youth had a lesson for the adults: their investing was consistent with parish values. The leaders decided the parish should follow suit *but apply responsible investing consistent with parish values to the entire portfolio*.

Episcopal Relief and Development itself does only community or impact investing and uses only program assets, not permanent investment assets. The organization increasingly focuses its programmatic investments on supporting the SDGs. The organization understands that achieving the SDGs will require amounts of capital too large to be delivered through traditional grants. Instead, the development community needs to recruit investments from investors seeking *to profit from* achieving the SDGs. Such efforts could open up opportunities for Church institutions to join with for-profit investors to make substantial impact investments to achieve the SDGs and also obtain potentially substantial financial returns. Yet all investments to achieve the SDGs will need to take into account global climate change.

What about ESG?

As their stories demonstrate, almost all the parishes and dioceses discussed here have adopted responsible investing and applying analysis of *environmental, social and governance* (*ESG*) factors for themselves, although not all in the same way. Among the parishes, especially, the size of endowments and the resources available for managing them vary considerably. The range of investments chosen runs from products available widely at retail, such as mutual funds and Exchange Traded Funds (ETFs), to private capital. (ETFs are funds that allow investors to trade in mutual funds in the market, rather than having to deal always with the mutual fund sponsor/manager.) All these investments can be used for responsible investing using ESG.

"ESG" has become something of a buzz word, but the term has genuine content. There are very good reasons, financial *and* nonfinancial, to consider environmental, social and governance factors in investing. Using ESG exposes risks and opportunities with financial and other implications that traditional financial analysis can miss. As responsible investing has grown in scale and importance, substantial numbers of investors and investment practitioners have committed to applying ESG, because they believe this is the wise and prudent course for stewards of institutional assets. All ESG investors do not end up with the same portfolio or results. They apply these factors along with financial analysis and judge success not just on financial return but also on ESG outcomes. See *Principles for Responsible Investment*, below.

Moreover, increasing awareness in the last decades that global warming, if unchecked, could lead to devastating disruptions to human life has helped convert more participants in the capital markets, who traditionally have focused solely on financial factors, to begin to use ESG. ESG is not universally received wisdom, but fear of climate change has drawn ESG into the capitalist mainstream. In the September 27, 2020, New York *Times*, Allison Herren Lee, a Commissioner of the Securities and Exchange Commissioner, wrote as follows:

> *One prominent outdated notion is that investments made on the basis of environmental, social and governance risks — known in the industry as E.S.G. — are merely about one's policy preferences or moral choices. That might have been closer to reality over a decade ago, but as E.S.G. investing has grown and matured, so too has an understanding of its value.*
>
> *Today, lenders, credit rating agencies, analysts, stock exchanges and asset managers representing trillions in investments use E.S.G. as a significant driver in capital allocation, pricing and value assessments. A major study recently found that a large number of powerful institutional investors rank "climate risk disclosures" as being just as important in their decision-making processes as traditional financial statements and other metrics for an investment's performance — like return on equity or earnings volatility.*
>
> *Researchers at the Bank of International Settlements have called climate change "a colossal and potentially irreversible risk of staggering complexity." It is a systemic risk that will threaten global financial stability and spare no corner of the earth: Health, food security and water supplies across the globe will be disrupted.*
> *https://www.nytimes.com/2020/09/27/opinion/climate-change-us-companies.html*

Moreover, the Federal Reserve recently has joined other central banks in acknowledging the potential for climate change risk to disrupt financial systems. In its half-yearly *Financial Stability Report* issued on November 9, 2020, the Federal Reserve noted that "[p]romoting financial stability is a key element in meeting the Federal Reserve's dual mandate for monetary policy regarding full employment and stable prices." Then, for the first time in history, the Federal Reserve stated in that same *Report* that climate change can pose a risk to financial stability:

> *The Federal Reserve is evaluating and investing in ways to deepen its understanding of the full scope of implications of climate change for markets, financial exposures, and interconnections between markets and financial institutions. It will monitor and assess the financial system for vulnerabilities related to climate change through its financial stability framework. Moreover, Federal Reserve supervisors expect banks to have systems in place that appropriately identify, measure, control, and monitor all of their material risks, which for many banks are likely to extend to climate risks.*
> *https://www.federalreserve.gov/publications/2020-november-financial-stability-report-purpose.htm*

This *Report* does not announce that the Fed has converted to ESG but understanding the risks climate change poses to financial stability will require some application of ESG. ESG clearly is gaining adherents. And, while using ESG may not yet be universal practice, every investment professional seems to offer ESG services. There may be almost as many ESG approaches as investors trying to use ESG or advisors trying to sell ESG.

Some assert ESG does not yield ethical guidance. One observer has said ESG can find the most environmentally clean, socially responsible and best run oil company, but it will still be an oil company. Others assert that raising questions about environmental, social and governance factors, especially ESG opportunities and risks, necessarily leads to making value judgments about companies and their policies and practices. Such a debate about ESG need not detain Church investors long. Church institutions are guided by values, and when they act as investors, there is no reason they cannot bring their Church values to bear, whatever a specific investment analysis (ESG or not) may suggest. Moreover, through using ESG a Church investor may be able to sharpen its understanding of how to apply its values in the investment context.

Principles for Responsible Investment

The Principles for Responsible Investment (PRI) are built on ESG. In response to a call by the UN General Secretary, institutional investors launched PRI in 2006. PRI describes itself as “the world’s leading proponent of responsible investment,” with over 3,000 signatories, of which over 500 are asset owners that hold total assets exceeding $100 trillion. PRI is a prime example of what the industry calls a “stewardship code,” or voluntary compact to promote responsible investing. Observers question how effectively such codes of conduct, especially those with many signatories, can guide behavior. PRI and other such codes certainly are aspirational.

Signatories to the PRI commit to the six Principles for Responsible Investment, including to incorporate ESG into their investment analysis, decision-making and policies and practices, and to promote ESG and the Principles. Signatories also are required to complete a detailed report annually on their application of the Principles and ESG. Some signatories find this requirement onerous, but observers see it as a useful means to make the Principles work.

Practical Church Guidance

A number of Episcopal Church institutional investors we interviewed told us that they had to work out their own approaches to affirmative responsible investing without practical guidance from any denominational body or authority. They looked for but could not find information from the denomination on the “nuts and bolts” of such investing. Some, but not all, of these were less well-resourced investors who have not yet developed stories we could tell.

On the other hand, one diocese whose story we do tell below made personal contact, by some persistence, with DFMS staff and CCSR members. Over some weeks, this diocese directly sought, and received, advice and suggestions on how to do affirmative as well as negative responsible investing. The diocese’s team was able to get answers to their questions. Perhaps we should expect that dioceses and parishes generally will persevere until they get help, but the larger Church could make access to such information and counsel more readily available.

What are Episcopal values?

The Episcopal Church in Connecticut declares its Values Fund is managed to "reflect the values of the Episcopal Church in areas of environmental stewardship, social responsibility and corporate governance ('ESG' Performance)."

As we listened to leaders of institutional investors in the Church, we frequently heard the term "Episcopal values." Often, too, we were asked "what are Episcopal values?" Sometimes those very words were used, sometimes the question was stated differently. However, they phrased it, institutional leaders wanted to know what values Episcopal Church institutions should apply in investing. They were asking for help in developing a theology of investing. Again, some, but not all, asking "what are Episcopal values" were among the less well-resourced investors.

Almost all these institutional investors were aware of the exclusion policies/negative screens that have been mandated for DFMS – and recommended for the Church at large – by Convention and Council over the last decades. They found those negative screens (or no-buy lists) on DFMS's website. They valued this negative policy guidance, and many adopted it.

What they did not find was guidance from the Church on what "Episcopal values" to apply when making affirmative or positive investment decisions, rather than excluding or divesting investments. They did not find advice to parishes and dioceses on discerning what the Church's faith said about questions of investing that were not covered by existing negative screens.

Clearly the Church has "values," and the Church speaks and acts on them. The Church has recommended divestment as the appropriate response in faith to a handful of investment issues. However, the Church now lacks an organized means to help Church investors draw out more affirmative implications of the values expressed in the Church's faith and teachings. Church investors would benefit if the Church had such means.

The institutions whose stories we tell in this report did not stop because they could not find denominational guidance on "Episcopal values." They acted, in faith, to develop their own expressions or understandings of positive values for investing. To do this, these parish churches and dioceses, and Episcopal Relief and Development, themselves drew on scripture, the Church's teachings and their own reading of Church policy statements.

Three of the dioceses received proposals in diocesan convention that focused on fossil fuel divestment. Drawing on volunteer and professional expertise within the diocese and applying their understanding of the Church's ethical teachings as well as of responsible investing, these dioceses were able to develop statements of values to support *affirmative* responsible investment policies. Then they were able to build consensus, often through formal convention action, for diocesan investing based on these values, using ESG. The results – their "own" theologies for investing – now will support negative decisions, to divest to avoid harms, as well as affirmative decisions to invest for positive social and environmental outcomes.

Four parishes completed a congregational planning process before addressing responsible investing and ESG. Typically, members of a congregation would work together to define a parish's vision, mission and values based on scripture and the Church's teachings. Having established a congregational consensus on values, these parishes then undertook a further step. Often aided by expert members of the congregation, they worked to apply parish values affirmatively to their portfolios, through adopting responsible investing using ESG. Self-consciously they made investment policy based on the values they had recently identified.

Instances drawn from some of the stories may be instructive.

To define its values ***Trinity Church Wall Street*** turned to well-established Episcopal Church resources. Through a parish strategic planning process Trinity identified its six core values, defining them by reference to scripture and the Baptismal Covenant. For example, Trinity Wall Street defined one of these – *inclusiveness* – in part as follows:

> *There is neither Jew nor Greek, there is neither slave nor free, there is neither male nor female; for you are all one in Christ Jesus. – Galatians 3:28*
>
> *We will embrace diversity and will respect the dignity of every human being.*
>
> *At Trinity Church Wall Street, all are welcome. We seek to honor the God-given dignity and learn from the experience of every human being.*

After identifying its six core values, Trinity turned to applying them affirmatively to its investments. The Trinity investment committee concluded that responsible investing would provide the framework for the investment team to evaluate investment opportunities *through the lens of Trinity's core values*, such as *inclusiveness*. The committee prepared a new Investment Policy Statement (IPS) embodying its conclusions, and the vestry approved the IPS. Following vestry approval, Trinity's policy has been that all investments in the diversified portfolio are to be made consistent with principles of responsible investing, *in light of Trinity's core values* and in support of Trinity's strategic imperatives/areas of strategic focus.

In its Diocesan Convention the ***Diocese of Oregon*** received a proposal to divest from fossil fuels. Instead of voting whether or not to divest, the Convention and Diocesan leadership developed a proposal including a request to Convention delegates to choose ethical values for investing. Then the Diocese would build a portfolio to apply the chosen values.

The Diocese asked Diocesan Convention delegates to place dots on a display board to indicate their positive *and* negative *socially responsible investing and gospel values priorities* (SRI/Gospel value priorities) among multiple possibilities identified on the display board. After further work, the Convention approved a new diocesan socially responsible investing fund (SRIF) for parishes and other institutions in the Diocese. Convention also established a Stakeholder Advisory Committee (SAC) to help set up the SRIF and to connect investors and others with it.

Then the Diocesan investment committee and the SAC, with a consultant, used the delegates' SRI/Gospel value priorities to design and construct a portfolio for the SRIF that met the affirmative socially responsible investment priorities of the delegates and avoided what the delegates sought to avoid. They also worked to explain the portfolio they had crafted and the choices they made to realize the values Convention delegates chose. Since the SRIF has been up and running, the SAC and the investment committee have continued to work with investing parishes and others in the Diocese to assure the SRIF reflects the Gospel value choices of Convention delegates and also achieves the financial and socially responsible results intended.

Like Trinity Wall Street, ***Trinity Church, Indianapolis*** first set out to articulate its mission priorities and then identified how its endowment might be invested in support of each of those priorities and in alignment with the parish's values. In its new Investment Policy Statement (IPS) Trinity Indy stated its purpose clearly:

> *Ethical investment considerations form an integral part of Trinity Church's mission and witness. Through a faith-based investment policy, Trinity Church seeks a constructive engagement with the corporate world in order that responsible environmental and business practices and high standards of corporate behavior are encouraged and supported …. An important component of an ethical investment policy is the use of positive ethical criteria in assessing companies.*

Consistent with the description two pages above, Trinity Indy did not find positive ethical criteria (that is, guidance on "Episcopal values") available from the Episcopal Church. Instead, Trinity turned to the Church of England. Trinity Indy's IPS adopts positive criteria developed by that Church's *Ethical Investment Advisory Group (EIAG)*, summarized in Trinity's IPS as follows:

- Responsible employment practices
- Best corporate governance practices
- Conscientiousness regarding human rights
- Sustainable environmental practices
- Sensitivity toward the communities in which businesses operate

According to the Church of England, "the purpose of the EIAG is to enable [the investors the EIAG advises] *to act as distinctively Christian – and Anglican – institutional investors*. [Emphasis supplied] The EIAG develops ethical investment policy recommendations which, once agreed by the [institutions it advises], are adopted by them, communicated to the wider Church and implemented." More on the Church of England is found in the Context section of this report.

The two parishes and one diocese discussed immediately above, and others in our study, demonstrated independence of spirit and creativity in finding, without denominational guidance on "Episcopal values," their own ways to an affirmative investment policy grounded in their understanding of the Gospel and the Church's teachings. However, the Church could do more to support parishes and dioceses as they seek to be affirmative as well as negative investors of faith. The Trinity Indy story suggests we might learn from the Church of England.

Church institutional investors by definition have assets to invest, but all are not alike. Few investors have available the human and financial capital that Trinity Indy has, not to mention Trinity Wall Street. The whole Church could help individual institutional investors become better, more faithful and more responsible investors. As their stories show, the parishes and dioceses discussed here have developed expertise in faithful, responsible, affirmative investing. They could apply their experience to help the Church support other Church investors.

Drawing on the experience of these dioceses and parishes, the Church could devise means to help investors in the two ways the above account suggests it has not. First, the Church, as the Church, could make “ethical investment policy recommendations” to investors that reflect affirmative “Episcopal values.” Second, the Church could give practical support for applying those recommendations. Providing recommendations on the principles to apply and guidance for applying them could yield real support for institutions seeking to invest responsibly and faithfully. In short, the Church could help its institutions to use faithful, responsible investing both to achieve positive ethical outcomes and to take stands against harmful policies and practices, while prudently achieving financial returns needed to support the Church’s mission.

Recommendations

We make the following recommendations:

(1) We recommend that General Convention give thanks for and affirm the work and witness of these fifteen institutions as faithful and responsible investors, and commend them to institutional investors across the Church as examples of how faithful and responsible investing can be done: Episcopal Relief and Development; All Saints Church, Pasadena; The Episcopal Church of the Ascension, Hickory, North Carolina; St. Bartholomew's Episcopal Church, Baltimore; St. James Episcopal Church, Black Mountain, North Carolina; St. Stephen's Episcopal Church of Ridgefield, Connecticut; Trinity Episcopal Church, Indianapolis; Trinity Church Wall Street; Episcopal Diocese of California; Episcopal Church in Connecticut; Episcopal Diocese of Massachusetts; Episcopal Diocese of Michigan; Episcopal Diocese of New York; Episcopal Diocese of Oregon; and the Episcopal Church in Vermont.

(2) We recommend that General Convention affirm to all institutional investors in the Church the value and importance of faithful investing (defined as investing institutional assets consistently with the Church's faith and teachings and the Church's mission) and of responsible investing (defined as addressing ethical concerns for social, environmental and governance matters (ESG), including climate change and human rights).

We further recommend that Convention recommend that all institutional investors in the Episcopal Church consider adopting faithful investing and responsible investing for their investment programs and portfolios and managing their investment assets using the following elements of responsible investing: applying ethical and theological guidelines, including ESG, in investment selection and management; shareholder engagement, including voting proxies; and investing for responsible social and environmental outcomes as well as for financial return.

Note: to give an overview, at the top of each story appear four headings. These identify the three elements General Convention assigned to be examined – "[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return" – plus ESG, because ESG is often used to implement guidelines.

Stories

Episcopal Relief and Development

Investing as program yields program results and financial returns to support additional program

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**DFMS**	**DFMS**	**Yes**

Lord, when was it that we saw you hungry and gave you food? we saw you thirsty and gave you something to drink? we saw you a stranger and welcomed you? we saw you sick and took care of you? we saw you in prison and visited you?
"Truly I tell you, just as you did it to one of the least of these, you did it to me."

Matthew 25:37-40 (NRSV)

Background

In 1940, the National Council (the Executive Council under its former name) directed the formation within the Church of the Presiding Bishop's Fund for World Relief (PB Fund) to support and carry out war relief. Initially, the PB Fund assisted refugees and, after the conflict ended, helped re-build Anglican institutions damaged in World War II. Then the PB Fund expanded its mission to support humanitarian aid worldwide, including at home in the United States. The PB Fund provided disaster relief, and rehabilitation and development assistance, and continued to support resettlement of refugees in the United States.

Through the next decades the needs for refugee resettlement, disaster relief and development aid all increased, and the PB Fund expanded its efforts, with the support of donors across the Church. In 1988 Episcopal Migration Ministries became an independent organization to support refugee resettlement, while the PB Fund concentrated on relief and development.

In 2000 the PB Fund was renamed *Episcopal Relief and Development*, to reflect its two main efforts, while continuing as a Church program. *In 2001, the organization for the first time supported a microcredit program as part of disaster recovery and development work in Belize.* In 2002, Episcopal Relief and Development (Episcopal Relief & Development) was separately incorporated and received recognition from the Internal Revenue Service as a tax-exempt charitable organization. As an independent entity, Episcopal Relief & Development continues to be closely affiliated with The Episcopal Church, as *TEC's* relief and development organization.

Episcopal Relief & Development holds trust funds currently valued at approximately $20 million. These trust funds are held and managed for Episcopal Relief & Development by The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (DFMS), the corporate entity holding and managing investment assets for The

Episcopal Church as a denomination. As well as holding and investing assets for itself, DFMS, in a manner similar to that of a mutual fund, holds, in a custodial relationship, and invests assets for numerous entities related to TEC, including Episcopal Relief & Development.

In addition to its trust funds, Episcopal Relief & Development has other financial assets that it invests for itself. These are program assets, *used programmatically as investments* for economic development and recovery. Investing these assets is the subject of this discussion.

From the beginning Episcopal Relief & Development's principal tool for supporting and guiding both disaster recovery and economic development has been making grants to be expended by partner organizations working in communities, in the U.S. or abroad, that need aid. Along with grants, the organization has provided training and technical support to help grow local capacity.

Today, grants, with training and support, continue to be Episcopal Relief & Development's main tools for disaster relief, recovery and development. However, as noted above, in 2001 the organization first used microcredit to support recovery and development work, and the use of such programmatic investing has increased down to the present.

Episcopal Relief & Development Programmatic Investing

Since its first microlending effort in Belize in 2001, Episcopal Relief & Development has gained experience *using investments programmatically* (programmatic investing or investments as programs) both in the United States and across the globe. The organization has learned that, in some contexts, such investing, through the use of financial tools such as guarantees, fund capitalization, loans, and equity investments, can help leverage and expand resources available for community development on the ground much more than donor grants could do alone.

Following Hurricane Katrina, Episcopal Relief & Development worked with local partners in the U.S., including the Diocese of Mississippi and Hope Community Credit Union, to use Episcopal Relief & Development financial assets to support and structure a housing loan guarantee fund. Episcopal Relief & Development's commitment of capital helped create a pool to support second mortgages for 250 homeowners living below the poverty line on the Gulf Coast of Mississippi, enabling them to rebuild their homes.

From the beginning Episcopal Relief & Development has emphasized support for local microfinance programs in its efforts to supply capital beyond what is possible through grant-making. The organization has found that microfinance lending leads to asset growth primarily in communities where people are also saving.

This learning led Episcopal Relief & Development, at the beginning of the second decade of the 21st Century, to launch a program with partners in 16 countries that combined training in savings with increased access to lending capital for women living on under $2 a day. Over seven years, the organization "invested" around $2 million in grants for training and facilitation and provided an additional $2 million in loan capital for revolving funds. These programs enabled its partners to provide credit in their own communities. During the period Episcopal Relief & Development and its partners helped in the formation of nearly 2,500 Savings Groups with over 52,000 members across those countries. The participants, nearly all women, saved more than $8 million in their own capital as part of the program and loaned more than $5 million from their own savings in mutual support to one another, in addition to what Episcopal Relief & Development provided. After the end of the organization's direct engagement in the effort, the collective funds have continued to revolve in the participants' communities.

In addition to its work with savings groups and loan circles, Episcopal Relief & Development has gained experience with a "pay it forward" fund working between "receivers" and "givers" in community. The organization, with other grantors, has supported the ECARE program managed by the Episcopal Church of the Philippines. In such a "pay it forward" arrangement, a "loan" recipient does not pay "back" the amount of the "loan" to a "lender," but passes it "forward" to another recipient/borrower, who is expected, in turn, to pay "forward" the "loan" to another recipient, who is expected to continue passing the "loan" assets forward, and so on.

Drawing on all these experiences since 2001, in November 2016 the Board of Directors of Episcopal Relief & Development adopted a new strategic plan for 2017-2021, for "unlocking abundance," with one objective to launch and learn from at least three additional programmatic investment experiences during the period. The intention of this current work is not only to invest in loans, revolving funds and other financial inclusion activities which provide capital for the participants, but also to deepen understanding and utility with "earning" gained and returned to the organization: how *investing as program can yield financial returns which can then be reinvested for more program results without raising further donor dollars.*

In this five-year cycle the organization continues its support for savings and loan circles and also has closed a new loan in Colombia. In this transaction it has invested alongside ECLOF Colombia, a microfinance fund affiliated with the global organization ECLOF (ECLOF, formerly known as the Ecumenical Church Loan Fund, is an offshoot of the World Council of Churches). This investment, in farmers' irrigation and water system infrastructure, will not only make a needed improvement in rural livelihoods, but the principal together with nominal interest also will be returned after a time for redeployment by the ECLOF Colombia microfinance program. In addition, Episcopal Relief & Development continues its support for the ECARE "receivers to givers" program in the Philippines and is reviewing additional investments to support smallholder farmers and fishermen in both the Philippines and Sri Lanka.

Sustainable Development Goals

During this strategic plan period, Episcopal Relief & Development is seeking intentionally to learn from its past and current efforts in order to become more effective at programmatic investing and to leverage the impact of that investing. It knows the challenges facing development organizations are growing. The organization also knows the resources that can be expected to be available to meet those challenges through traditional grant and support programs are likely to fall short. More and more, the monies available for development are expected to be a “blend” of traditional grants by aid and philanthropic organizations and *investments* by banks, financial institutions and others with assets to invest.

In September 2015 the United Nations General Assembly adopted the Sustainable Development Goals (SDGs) as successors to the earlier Millennial Development Goals (MDGs). The MDGs were adopted in 2000 with a target date for achievement of 2015; the MDGs were not achieved by that year, but that year the UN adopted the SDGs, with a target date for achievement of 2030. The General Convention endorsed the SDGs in 2018, asking that TEC institutions support achieving the SDGs by devoting 0.07% of their budgets to development.

The global development community broadly agrees that achieving the SDGs will require around $5-7 trillion in grants, investments, and other aid be put into development by 2030. In that period, national governments, other governments, international agencies and philanthropy will provide trillions of dollars, but far less than is needed. Grants alone cannot do the job.

The logical source for the large amounts of additional capital needed would be investors seeking to profit from achieving the SDGs. In 2016 the Business and Sustainable Development Commission (BSDC) was launched under the auspices of the UN to bring together leaders from business, finance, civil society, labor, and international organizations to work together to support achieving the SDGs and to identify how businesses could contribute to that end. The BSDC estimates that achieving the SDGs could open up $12 trillion of market opportunities in food and agriculture, cities, energy and materials, and health and well-being and create 380 million new jobs by 2030. Accordingly, the nongovernmental and philanthropic aid community wants to participate alongside for-profit companies in support of sustainable development.

Episcopal Relief & Development knows achieving the SDGs will require it and others to step beyond traditional grant-making. It believes it should help unlock funding for development and social impact by using its assets through aid efforts that “blend” philanthropy and leverage a variety of financial tools. Now Episcopal Relief & Development is seeking to learn from its two decades of programmatic investment experience, and from the experience of others, to develop more such tools for relief and development and then to use them more effectively.

Note: to give an overview, at the top of each story appear four headings. These identify the three elements General Convention assigned to be examined – "[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return" – plus ESG, because ESG is often used to implement guidelines.

Congregations and Parish Churches

All Saints Church, Pasadena

Seeking fossil fuel divestment leads to ESG investing

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

All Saints Church was organized in the 1880s and has grown substantially. Now All Saints has one of the larger congregations in Episcopal Diocese of Los Angeles and in The Episcopal Church, with about 4,000 members. For eight decades All Saints has been known to be one of the more activist congregations in TEC, deeply engaged and committed to advocating and acting for racial and social justice, for human rights and for care of creation.

For the size of its congregation, the parish has an endowment that may appear modest, amounting to about $2.5 million. Historically, All Saints invested its assets in the Diocesan Investment Trust of the Diocese of Los Angeles. About 2010 the vestry and its investment committee began to look for alternative investment vehicles for All Saints. They hoped to enable the parish to better reflect its faith commitments in its investments, particularly by excluding fossil fuel companies from its portfolio.

In 2016 All Saints engaged the Church Investment Group (CIG) as investment manager. CIG is a not for profit investment manager that serves institutional investors related to the Episcopal Church; CIG is now a signatory of the UN Principles for Responsible Investment (PRI). In response to All Saints' requirements, CIG created its *Fossil-Fuel Free ESG Multi-Asset Fund* (the Fund). All Saints became the first investor in the Fund in October 2016.

The Fund incorporates environmental, social and governance (ESG) factors in its security selection. The Fund takes into account "positive environmental practices, resource efficiency, sustainable business practices that include safe and supportive work environments, product and service safety, strong corporate governance, good relationships with stakeholders including employees, customers and communities and other activities that enhance the long-term sustainability of its investments." Through ESG screening, the Fund "seeks to maximize long-term performance" and emphasize "investments with sustainable and responsible practices."

The Fund excludes tobacco companies and "companies for which the manufacture of firearms represents at least 10% of annual revenue." Finally, the Fund does not invest in companies with "substantial in the ground fossil fuel resources as reflected by the following MSCI subindustry classifications: Integrated Oil and Gas, Oil and Gas Exploration and Production, and Coal and Consumable Fuels.”

The Fund makes investments that combine responsible social and environmental outcomes with financial return. For example, through the bond portfolio in the Fund, All Saints is financing wind and solar energy, public education with University of California bonds, and job creation and economic development with the Michigan Strategic Fund. In addition, separately All Saints has funds on deposit with the Diocese of Los Angeles credit union that provide collateral for loans to documented and undocumented immigrants for payment of legal fees.

The investment committee believes the Fund meets All Saints’ needs. Committee members are pleased that the Fund provides an affirmative approach to environmental and other issues in investing. The committee is now being reconstituted to enhance the congregation’s engagement with investment issues.

The Episcopal Church of the Ascension, Hickory, North Carolina

Following Jesus’ two great commandments – and being led to ESG investing

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**No**	**Yes**

The Episcopal Church of the Ascension was founded in 1873 in Hickory, North Carolina. Part of the Episcopal Diocese of Western North Carolina, Hickory is a small city of 40,000. For years Hickory was a center for furniture making, and that continues to be its major industry.

By its mission statement Ascension is committed “to love, think, and act as the body of Christ in the church, our community, and the world.”

Ascension has nearly 400 members and an average Sunday attendance of over 90. The parish’s annual budget is around $500,000. The Ascension endowment has a value of about $3 million, and the annual draw, set at 4% of a three year average rolling market value, yields about $100,000 to support the budget. In accordance with the terms of the original gift instruments, 56% of the endowment draw is used to support outreach efforts.

In 2016 Ascension found itself looking for a new advisor for managing its endowment. In November the rector attended a program at the Diocesan Convention about responsible investing and the application of environmental, social and governance (ESG) factors in investment management. The rector was taken by the idea that, if the parish invested with social and environmental outcomes in mind, as well as financial returns, it was possible Ascension could do as much or more to support God's kingdom through investing as it was doing with its direct outreach. Because a portion of its endowment was given to support outreach, it seemed important for Ascension to consider how the money was invested.

The rector shared her insights with Ascension's financial leadership. After study and discussion, the lay and clergy leaders made the decision to shift some of Ascension's portfolio into affirmative ESG investing.

The team interviewed several candidates for investment advisor, specifically asking about their experience with and commitment to ESG investing. The team selected a local firm and asked the firm to design an approach combining two components. After the firm made its presentation to the vestry, the vestry approved the new approach.

The bulk of the endowment, 70% by value, is invested to screen out companies involved with fossil fuels, tobacco, weapons, gambling, adult entertainment, and with poor environmental records. About 8% is in mutual funds that cannot be screened. The remainder, nearly 22%, is managed for ESG outcomes by a firm committed to an active ESG program.

The *financial* effect of the new approach has been positive. Ascension's financial advisor says "… there is ongoing debate about the impact of ESG mandates on performance. There is more and more belief that it can be done without sacrificing return. And hope that it could positively impact return. … It will take time for these positive social and governance mandates to fully play out. But they have certainly played out positively over the last three years."

The rector says that, in making this change, the parish was guided by its formal mission statement, to love, think, and act as the body of Christ in the church, community, and world. She adds: "We were also following Jesus' two great commandments: to love God with all our hearts and minds, and to love our neighbor as ourselves."

St. Bartholomew's Episcopal Church, Baltimore

Called to use all financial assets – including investments – as tools of mission at the same time they yield funding for mission

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

Background

St. Bartholomew's Episcopal Church was formed by Whites in 1857, just before the Civil War. Maryland was a chattel slave holding state yet had a significant population of free Black people. The state remained in the Union in part due to intervention by President Lincoln. In the last century Maryland became more urban, led by the growth of Baltimore (and Washington, D.C.), and the state became more diverse, culturally and economically. St. Bartholomew's built its current church in 1931 in a suburb within city limits. Today the parish is extremely diverse, drawing people of many backgrounds from Baltimore and the suburbs beyond.

St. Bartholomew's (St. B's) has over 300 members; its budget approaches $600,000 annually.

Vision, Mission and Core Values

In 2005, after a year-long effort to set parish goals, the vestry adopted the following statement of St. Bartholomew's Vision, Mission, and Core Values:

Vision

We will, with God's help, be a vibrant faith community that is a blazing beacon of God's transforming love in the world.

Mission

God is calling us to take righteous risks. We accept this call, and will respond by seeking and serving Christ in all people.

Core Values

St. Bartholomew's Episcopal Church

- *places worship at our center*
- *promotes inclusivity and openness*
- *has a strong commitment to pastoral care*
- *is dedicated to education, both learning and teaching*
- *empowers the laity for leadership and ministry*
- *is deeply committed to outreach and service*

Budgeting and Investing

The St. B's annual operating budget is met through current pledges and gifts and other current revenues, not from income or other proceeds of the parish's investment assets. Each annual budget by design includes more projected expenditures than revenues; thus each has a "deficit." These annual deficits have gone as high as 15%, but usually the percentage is far smaller. Each year the parish is challenged to meet the actual monetary needs to sustain its life and mission. Historically more often than not the parish has met those needs.

Some years annual revenues have exceeded annual expenses. By policy an annual operating surplus may not be rolled over into the next year's budget but must be put into a cash reserve, so the next budget will start with a deficit. Such short-term cash reserves are then used only by specific vestry decision to fund grants for stated purposes. Grants may be made from cash reserves for mission, for improvements to parish property or to cover a prior year's unmet "deficit." Annually St. B's cash account runs in the range of $100-150,000. Depending on the year, up to about $50,000 of that may be short term cash reserves.

The value of St. B's long term investments has reached almost $1 million. As noted, investment proceeds of long term investments by policy cannot be used to support the St. B's operating budget. Endowment proceeds can only be expended by specific vestry decision and solely to support grant-making. Annually, on recommendation of the Funds Committee, the vestry may grant up to one-third of the endowment draw for specific property improvements, one-third for program initiatives, and one-third for outreach opportunities.

Called to Faithful Stewardship of Financial Assets

The Funds Committee at St. B's acts as an investment committee as well as participating in grant making. The Committee includes parish members who are investment professionals.

In 2020, after months of work by the Funds Committee, on recommendation of that Committee the St. B's vestry approved a new Investment Policy Statement (IPS).

At the very top of the new IPS the vestry has placed St. B's Vision and Mission statements. Thus, the IPS immediately affirms that, in handling its assets, the parish accepts *God's call* to "take righteous risks" and to respond "by seeking and serving Christ in all people."

Right after the Vision and Mission statements, the IPS places the following:

> *"St. Bartholomew's Statement of Social Responsibility: St. Bartholomew's is called to exercise faithful, competent and socially responsible stewardship in how it manages its financial resources."*

This statement repeats the language of "call." The statement also makes explicit that the call extends not only to St. B's investment assets but to *all* parish "financial resources." Moreover, St. B's is called to exercise *socially responsible* stewardship for all these resources.

Long before this IPS was adopted, St. B's exercised responsible stewardship in its financial operations by using banking as an instrument for mission. For years the parish has done its banking through credit unions that support community development. And St. B's has held its reserves in accounts with such credit unions.

Long term investment assets necessarily are included in the financial resources that the IPS requires to be managed faithfully, competently and with socially responsible stewardship.

In 2014, well before the new IPS was written, a member of the parish proposed to the Funds Committee that the parish consider investing a fraction of the parish's endowment responsibly, using environmental, social and governance (ESG) factors. The parish member was surprised by the committee's response. Instead of agreeing to invest a fraction of assets using ESG, the committee immediately decided to invest *all* the parish's endowment assets using ESG.

In line with that decision, in 2014 St. B's shifted its endowment fund to a customized, separately managed account (SMA) with 100% of holdings in ESG investments. The SMA is held with and managed by 1919 Investment Counsel (1919), a Baltimore based investment firm that is owned by Stifel Investment Corp. (which is based in St. Louis). 1919 also votes the proxies associated with the St. B's investment assets consistent with ESG principles. The Funds Committee oversees the performance of 1919 and its application of ESG.

The new IPS specifies that all assets are to be invested in the "SRI/ESG asset classes" listed in the IPS. The IPS provides that performance is to be measured against the following benchmarks: the MSCI KLD 400 Social Index and the Dow Jones Sustainability United States Index. St. B's assets currently are held in traditional stocks and bonds and ESG mutual funds and exchange traded funds (ETFs) and may be held in ESG alternative investments.

Community Investing

Since 2015 St. B's has allocated a portion of parish outreach program funds to micro-lending outside the United States through the web portal kiva.org. A parish team has met bimonthly to review opportunities and make loan decisions. Because the loans are paid back, the pool of capital for loans keeps growing. Lately the team has had close to $1000 to loan at every meeting. Through these loans, St. B's has helped individuals and groups around the world create and run small businesses in trade and agriculture and improve community facilities. Given the success of the team's efforts, St. B's has begun considering developing a similar micro-lending program for neighborhoods near Saint Bartholomew's.

Investor Engagement

In 2016 St. B's met with its investment manager, 1919. At that meeting St. B's raised its concern that 1919 had not demonstrated a commitment to diversity in its Baltimore operations, something that St. B's expected of its suppliers in the community. St. B's noted that 1919's parent, Stifel Financial Corp. (Stifel), had been the recipient of a shareholder proposal from a major investment firm asking Stifel to prepare and disclose an annual diversity report on the percentage or number of women and persons of color working for Stifel in major EEOC job categories and also a description of Stifel's policies and programs focused on increasing gender and racial diversity in the workplace.

After that meeting St. B's learned that Stifel had added two women to its board. Then St. B's re-stated its concerns in a November 2017 letter to 1919's management and a similar letter to the CEO of Stifel. In those letters St. B's wrote:

> *It is essential that our investments align with our vision and practices at St. Bartholomew's Episcopal Church. Diversity is at the core of our understanding of God, and leads our commitment to justice. We look forward to your commitment towards positive change for African-Americans and women in Baltimore, and to hearing about your platform for diversity, transparency, and social impact.*

The CEO finally responded to St. B's in March 2018 and promptly directed two senior Stifel and 1919 executives to meet with St. B's "at the earliest mutually convenient time."

After that meeting, Stifel/1919 told St. B's that St. B's had made the business case for diversity.

Since then 1919 has kept St. B's informed of its efforts to hire women and people of color in Baltimore. Stifel has added a person of color to its board.

St. B's believes the engagement was reasonably successful. And it was the right thing to do.

St. James Episcopal Church, Black Mountain, North Carolina

As the parish begins to address White privilege and racism, the vestry moves cash from a bank to a community development credit union

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**No**	**No**	**Yes**

The first services for the congregation that became St. James Episcopal Church were held in 1907. The congregation completed its first church building in 1912. A parish of the Episcopal Diocese of Western North Carolina, St. James moved to its current site in 2000. Black Mountain is a small town of about 8,000 in Buncombe County, at the foot of the Blue Ridge Mountains. Tourism and recreation play prominent roles in the town. The population is about 90% White.

St. James has about 350 members and an average Sunday attendance of about 200. The parish's annual budget is around $350,000. The parish established the St. James Foundation in 2003, not to support the church's budget, but to help the church be present to the world by making grants for religious, charitable, and educational purposes. The Foundation generally funds programs in Black Mountain and the surrounding area and supports initiatives in the Diocese of Western North Carolina. The endowment has a value of about $500,000.

St. James traditionally has done its banking with a large commercial bank. For some time the vestry has been considering making a deposit with Self-Help Credit Union to support Self-Help's community development lending and advocacy. The Diocese and about a dozen parishes in the Diocese have made deposits totaling over $700,000 with Self-Help. Self-Help is member-owned, federally-insured, and a major force for community development and economic empowerment in Western North Carolina.

On June 4, 2020, the St. James vestry met for the first time after the killing of George Floyd and the clearing of Lafayette Square of Black Lives Matter protestors to permit a photo opportunity at St. John's Episcopal Church for the President. The vestry made the following decisions:

> *The vestry will disseminate the following statement on behalf of our church:*
>
> > St James Episcopal Church will listen and discern ways to ally with people of color for justice. We commit to dismantling white privilege in ourselves, in our church and town, and in our world. Black lives matter.
>
> *The vestry voted to immediately move $50k in parish deposits to Self Help Credit Union.*
>
> *The vestry asked the St. James Foundation to educate the vestry on the current portfolio with an eye toward whether there are holdings in contradiction to the role and purposes of church mission and to explore what competitive options exist that positively impact racial equality while maintaining the fiduciary responsibility of the Foundation.*

In communicating these decisions to the parish, the senior warden and the rector began their letter by saying "we understand that racism is not limited to individual acts perpetrated by one person but a system of advantage in our world based on race. We acknowledge this work is long overdue. This is only our beginning." And they closed their letter: "In the words of our Presiding Bishop, Michael Curry: If it's not about love, it's not about God."

Since the vestry voted those actions, the deposit has been made, the statement has been released to the public, the congregation has engaged in reflection, study and action, and the vestry has opened dialog with the Foundation board.

St. Stephen's Episcopal Church of Ridgefield, Connecticut

Youth lead the way to incorporating parish values into parish investing

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes** (with new OCIO)	**Yes**

Background

St. Stephen's Episcopal Church was founded in 1725. Ridgefield was then a small New England farming settlement. In 1777 Ridgefield was the site of the only Revolutionary War battle fought inland in Connecticut; in the engagement the British burned St. Stephen's, where the

Continental forces had stored supplies. Ridgefield now is a largely residential community, just off the beaten path, but close to towns and cities in-state and to New York City, 50 miles away. St. Stephen's has over 400 members and an endowment valued at about $12.5 million.

For a few years St. Stephen's had felt unsure about how to be the church the world needed now. The parish last addressed its mission in the 1990s. Through Episcopal Church Foundation *Vestry Papers* and diocesan networks, St. Stephen's leaders had found other parishes' stories about re-imagining themselves for the 21st century. In 2016 the vestry decided to undertake a new visioning effort with the help of an organizational consultant who was a parish member.

Vision – Mission – Core Values

In January 2017 the parish began a year-long process that required vestry members and parishioners to listen to and engage with each other to discern what St. Stephen's should be. They began with a parish survey, followed by "town hall" sessions to listen to each other and share survey results and other resources. Then the parish held "visioning" sessions for small groups to imagine how St. Stephen's might "do church" differently. As they worked, the congregation began to realize they would have to re-imagine not just their life together but also how they used their financial and property assets.

At the end of 2017 the product was a three-fold statement:

Vision

A world made whole through God's transforming love in action.

Mission

Embracing and living God's commandment to love our neighbors – through worship, stewardship, and service to others.

Core Values

Faith-based Community

We are an inclusive, welcoming community that nurtures the spiritual development of all members in the recognition that often God is revealed to us through love, respect, and care for others.

Service

In the spirit of the example set by our Lord Jesus Christ, we are committed to using our gifts in service to our neighbors and others in God's created world.

Stewardship

We are committed to using our assets and blessings with great care in order for our beautiful, historic church to remain relevant and sustainable for this generation and those that follow.

Global Philanthropy Leaders

At the outset of the visioning effort, in February 2017, the rector attended the Consortium of Endowed Episcopal Parishes (CEEP) annual event . She learned how some TEC parishes were using environmental, social and governance (ESG) factors to invest faithfully, and how some invested assets to yield both financial return and positive social and environmental outcomes.

The same month a new parish member discussed with the rector a program in his prior church that, when he explained it, brought to mind her CEEP learnings. Adults and one youth of that parish had made small investments to fund microcredit loans in developing countries through a web portal called kiva.org. Although the loans paid no interest to the investors, the principal was repaid and re-loaned, repeatedly, so their small amounts of capital had growing impact.

The two brought the youth minister into their conversations. In a few weeks the three had designed a new program – for youth – called *Global Philanthropy Leaders* (GPL). St. Stephen's high school youth would be asked to use kiva.org to make microloans to enable people in developing countries to start or expand small businesses. The high school youth would lead the parish to respond to poverty on a global scale through making small investments that could make a big difference in people's lives.

The program launched at St. Stephen's at the start of the 2017 school year. Each high schooler was responsible to manage $225 in capital. They contributed $25 of their own money, and St. Stephen's vestry made the rest available. Wherever the assets came from, the young leaders understood that they were responsible to St. Stephen's for the program and the capital.

Together the high schoolers studied Jesus' words about the poor and about stewardship. They learned how faith can inform action. They studied the global economy and microfinance and learned how microloan programs work. They got a glimpse into the lives of the poorest of the poor. They saw that initial seed money could be re-paid and used again and again. They learned financial metrics and how to evaluate loan proposals. They learned to make decisions on where to put money. Most of all, the youth learned – by doing – what it means to be entrusted with investing funds. And they also learned how to talk to adult audiences about what they had learned and accomplished.

(In the first three years St. Stephen's GPL made 208 loans of $25 each, of which 133 were fully repaid in that time. Loan losses and delinquencies were well below the average for *Kiva*: only 0.35% was lost in currency exchange, and there were no defaults. In 2018, the St. Stephen's youth took GPL to parishes in Bridgeport and Darien, and in 2019 to half a dozen more parishes, with a matching grant from the Episcopal Church in Connecticut to help fund new participants. Through GPL about 65 high school students from nine congregations have invested $10,000 in the developing world, one $25 loan at a time. The loans have had a 99% repayment rate.)

Parish Values Investing

Soon after the parish had adopted its new Vision, Mission and Core Values, in February 2018 the investment committee chair made a presentation to the committee on sustainable investing using ESG. He asked: "Shouldn't our investment philosophy also dovetail with our Vision, Mission, and Core Values?" The committee members responded favorably.

Then in April 2018 the young Global Philanthropy Leaders reported to the adults of the parish for the first time. The report on GPL resonated with the parish and its leaders – they saw that through GPL the youth had been investing in a manner consistent with the parish's values.

The success of GPL inspired a common understanding among the rector, vestry and investment committee that the parish should align all the parish's investments with the parish's values.

The investment committee educated itself and made presentations to the vestry. In March 2019 the Vestry authorized the investment committee to begin a process to integrate ESG into the St. Stephen's portfolio and to seek a new investment manager. At a September 2019 "town hall" meeting for the entire parish, the investment committee presented a discussion of ESG and the committee's work and plans. In November the investment committee prepared a new Investment Policy Statement (IPS) incorporating the use of environmental, social and governance factors. The vestry approved the new IPS in December 2019.

The St. Stephen's IPS says:

> *St. Stephen's is a mission-driven entity. Our mission is "embracing and living God's commandment to love our neighbors – through worship, stewardship, and service to others." Our investment philosophy seeks to incorporate our values in our investments. Therefore, in addition to financial analysis, we will strive to implement an investment approach that incorporates ESG factors for 100% of the investments (as practical and cost-effective).*

Confident that ESG can work for St. Stephen's, the IPS goes on to say "St. Stephen's expects performance of its portfolio to perform as well, if not better, than a portfolio that does not incorporate ESG factors, *although we understand this is not guaranteed*." (Emphasis original.)

Parish Values Investing – Implementation and Returns

The current money manager took some time to develop an understanding of the new IPS. In March 2020 the manager agreed to it, and the investment committee began implementation.

For the period of transition to a new investment manager, the committee decided to move St. Stephen's assets to an ESG portfolio with the current manager. Due to record market volatility, that move was not completed until the end of August. As of August 31, 99.6% of the St. Stephen's portfolio was held in ESG compliant investments.

In September St. Stephen's issued a request for proposals (RFP) for an Outsourced Chief Investment Officer (OCIO) to manage St. Stephen's assets consistent with the parish's values. (The current manager was invited to make a proposal.) The proposals were to be received in October. After reviewing the proposals, the committee expected to hold an interactive meeting by Zoom with the top two respondents. In early December the investment committee expected to issue a recommendation to the vestry for hiring St. Stephen's new OCIO.

Other than its GPL investments through *Kiva*, St. Stephen's does not have any alternative investments. The current ESG portfolio includes at least one fixed income impact investment, and the investment committee chair anticipates that St. Stephen's may make more once the new OCIO is in place.

In the meantime, St. Stephen's youth and their mentors were gearing up for their fourth year of GPL. And the rector reports that "we're still inspiring and encouraging one another to live into our Vision, Mission, and Core Values."

Trinity Episcopal Church, Indianapolis

Aligning investments with parish values, to support parish priorities

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

Background

Trinity Episcopal Church now has more than 700 members. The parish was founded in 1919. The new parish bought an empty church building in the then northern suburbs. As the city changed and the congregation grew, the parish stayed in the neighborhood, about three miles north of the city center, the Soldiers and Sailors Monument at Monument Circle. The cathedral of the Episcopal Diocese of Indianapolis, Christ Church Cathedral, is located on the Circle.

In 1960 Trinity Indianapolis (Trinity Indy) opened St. Richard's Episcopal School, one of the first integrated schools in Indianapolis. Today the school is an independent organization recognized as a Section 501(c)(3) charity. The school and the parish share a commitment to urban mission and remain located together in a campus setting extending over a city block.

In the 1960s Trinity created an endowment fund to support its mission. At his death in 1977, Eli Lilly, a resident of Indianapolis, a major philanthropist, and a lifelong Episcopalian, made a number of significant bequests, including to the Diocese, to Christ Church Cathedral, to St. Paul's Episcopal Church, and to Trinity. Trinity added its gift – stock in Eli Lilly and Company valued at the time at about $4 million – to its endowment fund. With additions and net investment gains, the endowment has grown; currently the fund is valued at about $20 million.

The 2008-9 financial contraction spurred Trinity to better align its investment management with its mission and faith. By 2015 Trinity had concluded it should replace the traditional endowment investment model with an approach focused on its own mission priorities and values. After issuing a request for proposals and interviewing respondent organizations, Trinity engaged the Church Investment Group (CIG) as investment manager to help develop and implement such a new way. CIG is a not for profit company that serves institutional investors related to the Episcopal Church, and CIG is a signatory of the UN Principles for Responsible Investment (PRI). In November 2018 Trinity's vestry formally adopted its new policy, embodied in a new investment policy statement (IPS): *A Faith and Goals Based Approach to Investment*.

Faith and Goals Based Investing – Mission Priorities and Values Alignment

Under the traditional model Trinity would seek to maximize risk-adjusted return on its whole endowment and apply a single spending formula to determine the endowment's share of budget support. Now Trinity seeks to have everything the parish does – in mission/program and in investing -- reflect its values. To that end, Trinity has articulated its mission/program priorities and identified how its endowment *may be invested in support of each of those priorities and in alignment with the parish's values*.

Mission Priorities

Through a parish-wide review of its mission/program actions and expenditures, and with the advice of CIG, Trinity Indy has identified the following mission areas as community priorities:

A. Ministry, defined broadly as operational support for the worship, spiritual formation and pastoral programs of the parish;
B. Outreach and Justice (programs, including grant making);
C. Capital Expenditures for Buildings and Properties;
D. Direct Mission Investments (community investments, e.g., for renovation of neighborhood properties and/or to provide housing to homeless members of the LGBTQ community);
E. Funds for Future Generations (assets for use 30 to 100 years in the future, not now).

The IPS recognizes that these priorities will require different portfolios and asset allocations in order to support each of these priorities appropriately, and that these portfolios may be managed separately and independently.

The IPS identifies the following as primary investment goals for the portfolios for Ministry, Outreach and Justice and Capital Expenditures for Buildings and Properties:

- *Maintain the spending distribution rates of the individual portfolios, recognizing that a payout percentage will be set annually.*

- *Over a rolling three- to five-year period attain an average annual total return (net of fees) at least equal to the spending rate plus inflation to preserve purchasing power.*
- *Achieve positive social and environmental impacts.*
- *Avoid investing in companies whose negative environmental or social impacts clearly conflict with the values of the Episcopal Church.*

The IPS notes that these objectives lead to an equity-oriented investment strategy, which in turn implies that the total market value and amount available for spending may fluctuate. For 2020, the Ministry portfolio is targeted at 60% equities and 40% fixed income; the Outreach and Justice portfolio is targeted at 73% equities and 27% fixed income; and the Buildings and Properties capital portfolio is targeted at 50% equities and 50% fixed income.

The IPS identifies the following as primary investment goals for the portfolios for Direct Mission Investments and Funds for Future Generations:

- *Direct Mission Investments -- achieve an acceptable rate of return while producing impacts beneficial to the missions of Trinity Indy.*
- *Funds for Future Generations -- maximize the real return (nominal return less inflation) of the assets over a complete market cycle.*

For 2020, the Direct Mission investments portfolio is 100% fixed income, and the Future Generations portfolio is 99% equities, 1% fixed income, with a goal of capital appreciation over a 50 to 100 year time horizon.

In the past Trinity's portfolio included some alternative investments. Trinity does not now expect to own alternative investments, except through its Direct Mission Investments.

The most recent Direct Mission Investment is a loan to support the establishment and operation of Trinity Haven. Trinity Haven, located in Trinity Indy's neighborhood, is the first residence in Indiana dedicated to LGBTQ youth at risk for homelessness. Beginning in 2017-18, Trinity Indy created and incubated the organization. Now Trinity Haven is an independent Section 501(c)(3) charity and a designated Cooperating Ministry of the Diocese of Indianapolis.

Values Alignment

Trinity Indy's IPS identifies its explicit values orientation as follows:

> *Ethical investment considerations form an integral part of Trinity Church's mission and witness. Through a faith-based investment policy, Trinity Church seeks a constructive engagement with the corporate world in order that responsible environmental and business practices and high standards of corporate behavior are encouraged and supported. Trinity Church is also mindful of the need to avoid undermining the credibility, effectiveness and unity of the Trinity Church's mission by profiting from, or providing capital to, activities that are materially inconsistent with Episcopal values.*

Without using the term “environmental, social and governance (ESG) factors,” this paragraph clearly adopts ESG and responsible investing as Trinity’s overall approach. The paragraph also acknowledges the need to use negative screens (no-buy lists) as well as positive screens.

The IPS then states “An important component of an ethical investment policy is the use of positive ethical criteria in assessing companies.” As an Episcopal church, Trinity seeks to be ethical as a Christian institution and to use positive Christian ethical criteria to assess ESG factors affecting its investments.

For positive Christian, and Anglican, ethical criteria, Trinity takes the Church of England as its guide. The IPS adopts the criteria developed by the Church of England’s *Ethical Investment Advisory Group (EIAG)*, summarized as follows:

- Responsible employment practices
- Best corporate governance practices
- Conscientiousness regarding human rights
- Sustainable environmental practices
- Sensitivity toward the communities in which businesses operate

Trinity Indy’s IPS goes on to make explicit that, in exercising its fiduciary duty by following these Church of England criteria, Trinity Indy will “integrate Environmental, Social and Governance (ESG) investment criteria into Trinity Church’s investment management process.”

(See the Context section at the end of this report for more on the Church of England’s EIAG.)

Faith and Goals Based Investing – Implementation and Returns

As noted above, Trinity Indy engaged CIG to help Trinity Indy both to develop and to implement its faith and goals based investment program. With CIG’s advice, Trinity has engaged an Outsourced Chief Investment Officer (or OCIO) to manage, consistent with the Trinity IPS, all the Trinity portfolios described above, except the Direct Mission Investments. The Trinity vestry and investment committee directly manage the DMI.

Following implementation of the new IPS beginning at the end of 2018, and in spite of volatility since the pandemic hit, Trinity’s portfolios have performed in line with expectations, both with respect to ESG and financial return. Trinity’s leaders are happy with the results.

Trinity Church Wall Street

Investing responsibly, applying core values and strategic focus to evaluate opportunities along an investing spectrum, because no investment category yields purely financial or purely social return

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

Background

Anglicans worshipped in New Netherland when it was Dutch and in New York when it was English. In 1697 the English Royal Governor granted a charter to Trinity Church, which then built the first Church of England parish church in Manhattan, at the head of Wall Street. The governor also leased Trinity a 215-acre tract north of Wall Street, the King's Farm. In 1705 Queen Anne granted the tract outright to Trinity, thus providing the basis for Trinity's wealth.

Until the American Revolution, Trinity Church helped lead the development of the Church of England in the colony of New York. After the Revolution, Trinity Church was among those that navigated a path to an independent Anglican presence in the new nation. Trinity helped in the creation of the Diocese of New York and the Episcopal Church and their subsequent growth, down to the present. In the last half century Trinity has been more and more engaged across the Anglican Communion through Trinity's grants and leadership programs. In addition, from the 18th Century into the 21st, Trinity Church Wall Street has played a role from time to time in the business and residential areas in lower Manhattan and in the larger City called New York.

By the 20th Century, through sales and other dispositions, Trinity Church Wall Street's holdings had been reduced to about 14 acres of the former King's Farm, in what is now called Hudson Square. On the West Side, not far from Wall Street and the new, rebuilt World Trade Center, Hudson Square has become a focus of interest for real estate developers.

Norges Bank Investment Management (NBIM) is the investment management unit of Norges Bank, Norway's central bank. NBIM manages the Government Pension Fund Global, commonly known as the oil fund, for the Ministry of Finance, which owns the fund on behalf of Norway's people. In 1990 the government created the fund as a policy tool to support long-term management of tax, license and other revenues from Norway's North Sea petroleum fields. The oil fund is the world's largest sovereign fund, with assets of over $1 trillion.

Norway has set two principles for NBIM: All assets are to be invested outside Norway to keep the fund independent of Norway's economy. And all fund assets are to be invested ethically.

NBIM aims for real estate to comprise about 5% of oil fund investments. In late 2015, Trinity sold to NBIM a minority interest in a joint venture holding Trinity's commercial office buildings. In April 2016, the joint venture brought in Hines, the global real estate manager, as operating partner, with a 1% stake; NBIM holds 48% and Trinity 51%. Through this transaction, NBIM increased its exposure to real estate in New York City, while Trinity reduced its New York City real estate exposure and increased the liquidity and diversification of its investment portfolio.

In April 2016 Trinity engaged its first Chief Investment Officer (CIO), who had served as co-CIO of the Carnegie Corporation of New York, a foundation with about a $3 billion endowment. Trinity tasked the CIO to create a professional investment management team and then diversify Trinity's non-real estate portfolio to include substantially all asset classes and markets. That portfolio's exposure to scale private equity had to be built essentially from scratch.

At the end of 2019 Trinity's direct real estate and diversified financial investments had market values of about $3.1 billion and $3 billion, respectively, for an aggregate of about $6.1 billion.

Of the $3 billion in diversified assets, private equity represented a little under 6%. Over the next few years Trinity expects to grow that to 15-20% of diversified assets. Trinity's real estate holdings are comparable to investments that peer investors include in their private/illiquid exposures. Taking direct real estate and diversified private equity into account, at year end about 53% of the aggregate $6.1 billion was in private/illiquid exposures.

Strategic Planning and Responsible Investing

In 2014, the year before the formation of the Trinity-NBIM joint venture, Trinity began a strategic planning effort. The congregation, vestry, staff, faith and community groups, service organizations, and others in the City were engaged in the process. That work has continued through implementing phases in 2019-20.

Through this process Trinity identified its six core values – *faith, integrity, inclusiveness, compassion, social justice* and *stewardship*. In defining the values Trinity was guided by reading scripture and the Baptismal Covenant. Here are Trinity's statements for three of these values:

> *Inclusiveness*
>
> There is neither Jew nor Greek, there is neither slave nor free, there is neither male nor female; for you are all one in Christ Jesus. – *Galatians 3:28*
>
> *We will embrace diversity and will respect the dignity of every human being.*
>
> At Trinity Church Wall Street, all are welcome. We seek to honor the God-given dignity and learn from the experience of every human being. Everyone is invited to participate in worship, join activities, work together, and lend their voices to build a better world where everyone is seen and known as a child of God.
>
> *Social Justice*
>
> He has shown you what is good; and what the Lord requires of you: to do justice, and to love kindness and to walk humbly with your God. – *Micah 6:8*
>
> *We will strive for justice and peace among all people.*

Social justice is the love of God in action. God calls us to live justly for the good of the whole human family. With Trinity's focus on community building, we continue to live out the Gospel imperative of love that does justice.

Stewardship

There will come seven years of great plenty throughout all the land of Egypt. After them there will arise seven years of famine, and all the plenty will be forgotten in the land of Egypt; the famine will consume the world. – *Genesis 41:29-30*

We will sustain the gift of joy and wonder in all Your works.

Stewardship is the careful and faithful management of what has been entrusted to our care. Trinity's resources have been put to use for more than 320 years to support other churches, hospitals, and schools and to empower emerging leaders and support sustainable ministries in the neighborhood, the city, and the world.

Addressing these six values, Trinity identified its strategic mission to be building neighborhoods, leadership and capacity in New York City and across the Church, including the Anglican Communion. To carry out the elements of that strategic mission, Trinity identified five major initiatives: the building/facility it calls Trinity Commons, racial justice, housing and homelessness, leadership development and mission real estate development.

In the course of the planning process, as noted above, early in 2016 the vestry engaged Trinity's first CIO. Later that year the vestry and its investment committee addressed the role of responsible investing for Trinity's diversified portfolio. At its September 2016 meeting, the investment committee concluded that responsible investing would provide a "holistic framework" for Trinity's CIO and investment team to evaluate investment opportunities through the lens of Trinity's core values. Further, Trinity's strategic imperatives/areas of strategic focus – building neighborhood, leadership, and capacity – would provide a context to guide investment decisions, including in evaluating outside managers and how they achieved their results. The investment committee agreed Trinity should work with like-minded investors to support engagement and change in areas that fit with Trinity's values. Similarly, Trinity would seek to partner with peers to build capacity in responsible investing.

The investment committee prepared a new Investment Policy Statement (IPS) embodying its conclusions and recommended it to the vestry. In December 2016 the vestry approved the IPS.

Implementing Responsible Investing

Following vestry approval of the IPS, Trinity's policy has been that all investments in the diversified portfolio are to be made by the CIO and investment team *consistent with principles of responsible investing, in light of Trinity's core values and in support of Trinity's strategic imperatives/areas of strategic focus*. Since that time the investment team and CIO have been working with the investment committee, the vestry, the clergy and other staff, particularly the grants staff, to develop common understandings of how Trinity should implement its approach.

To support the approach, under the guidance of the investment team Trinity made three organizational commitments in 2019. In January Trinity joined the Interfaith Center on Corporate Responsibility (ICCR), the premier interfaith shareholder engagement organization in the United States. In February Trinity joined the Global Impact Investing Network (GIIN), the leading organization for impact investors worldwide. In December Trinity put in place with Glass Lewis & Co., LLC (Glass Lewis), the proxy-voting organization, arrangements for Glass Lewis to vote proxies for Trinity with public companies using environmental, social and global (ESG) factors and following guidance from ICCR and the Committee on Corporate Social Responsibility (CCSR) of Executive Council. Through ICCR Trinity can develop strategic partnerships with other engaged shareholders on issues that matter to Trinity. Through GIIN Trinity can develop impact investing opportunities with other investors. Through Glass Lewis Trinity can make its shareholder votes count.

Mission Investing Spectrum

Trinity seeks to advance its core values of faith, integrity, inclusiveness, compassion, social justice, and stewardship through both its programs and its investments – and to manage its programs and its investments to advance those values. In so doing, Trinity need not be constrained by traditional views of what constitutes an institutional asset or how assets can be deployed. For example, Trinity's engagement in ministry can be viewed as an expression of commitment to Christian values and a kind of asset embodying those values. Trinity's reputation also can be viewed as an asset: Trinity can "invest our name and reputation to convene, persuade and advance our mission."

Working with Trinity's vestry and investment committee and its clergy, investment staff, program staff, and grants staff, Trinity has developed a descriptive tool, the *Mission Investing Spectrum*, to help guide Trinity as it both carries out its programs and manages its investments. The tool sets forth a spectrum or continuum of categories of asset running from *reputation* through *ministry* and *grants* and then commonly recognized sorts of investment, including *program related investments*, *mission related investments*, *sustainable investments*, and traditional "purely" *financial investments.*

The institutional assets identified by these categories can be deployed – or invested – in a variety of strategic ways to advance Trinity's core values. The Mission Investing Spectrum relates these categories of asset to each other guided by the principle that none of these strategic investment categories yields purely financial return or purely social return.

Trinity Mission Investing Spectrum

Trinity Church Wall Street: Mission Investing Portfolio Categories						
Investing with, and in, our core values						
Commercial/ Traditional Investments	Sustainable Investments/ Socially Responsible Investments (SRIs)/	Mission Related Investments (MRIs)	Program Related Investments (PRIs)	Grants	Ministry	Reputation
Investments where the potential for attractive risk-adjusted financial returns is the primary reason for investing. At Trinity Church Wall Street, all investments are subject to a values screen	SRIs originally referred to investments that employed negative screens so that an organization could avoid investments in conflict with its values and/or mission. ESG investments adhere to good Environmental, Social and Governance practices. Can include: pro-actively seeking out ESG-aligned and/or sustainability focused funds; divestment from certain industries (e.g. "sin stocks"); proactive engagement through shareholder resolutions and/or proxy voting. With sustainable investments, investors are seeking investments that are aligned with the organization's values	Investments that expect mission/social impact as well as financial return. Targets risk-adjusted market rate returns though willing to consider lower risk-adjusted returns if the mission alignment benefits justify the investment. With these opportunities alignment with non-financial interests are the primary consideration and financial return/impact is important but secondary With MRIs investors are seeking investments that are aligned with the organization's mission.	Investment designed to advance mission work. IRS guidance states that PRIs must have the primary purpose of accomplishing a charitable purpose and production of income may not be a significant purpose. But unlike grants, which cannot be recovered, principal of a PRI is recoverable and the investment may earn interest or other returns.	Investment in an organization or project with no expectation of a financial return – the investor's sole interest is social return.	Investing in people and their lives and faith.	Trinity reputation is another form of endowment: We can invest out name and reputation to convene, persuade and advance our mission.
Investment Committee & relevant subcommittees		Grants Committee Investment Committee	Grants Committee		Clergy	

The Mission Investing Spectrum is a work in progress; see the version above. At the bottom of the columns the spectrum identifies vestry committees and clergy with roles relating to the portfolio categories listed above them.

Accordingly, the investment team applies the *Mission Investing Spectrum* as it develops Trinity's diversified portfolio, and the grants staff develops grants programs. In doing so, the investment team and the grants staff identify and apply a variety of benchmarks of financial and social return to assess performance.

The investment team describes how, with grants staff and others, the team applies the *Mission Investing Spectrum*, as follows:

> In the Investment Portfolio (commercial/traditional investments) we look to partner with managers whose values align with Trinity's, seek market-rate returning opportunities related to Trinity's strategic focus areas, and managers who incorporate ESG issues into investment analysis and decision-making and ownership policies and practices, and avoid investing in certain businesses that are in direct conflict with Trinity's core values (socially responsible investments). Assuming the risk-adjusted return of a positive impact investment

> is at least equal to that of other available investments, we would choose the positive impact opportunity over investments that are not values aligned.
>
> With socially-focused grants we look to fund organizations and dioceses that have the ability to spend grant funds responsibly and well.
>
> In the middle of the spectrum, we seek opportunities to blend social and financial return with mission related investments that expect mission/social impact *as well as* financial return. These investments target risk-adjusted market rate returns, but we would be willing to underwrite lower return/higher risk if the mission alignment benefits justify the investment and meet the benchmark. With these opportunities alignment with non-financial interests are the primary consideration and the financial return/impact is also important to our holistic values investing strategy.

In 2018 Trinity made an impact investment to finance healthcare facilities in underserved communities, and in 2019 it made two impact investments, both in affordable housing funds. In August 2020, 69% of assets under management in Trinity's securities portfolio were invested with managers that use at least one form of sustainable investing. The Trinity investment team expects to make many more such investments as it works with others to continue to develop Trinity's diversified portfolio and improve the usefulness of the *Mission Investing Spectrum*.

Note: to give an overview, at the top of each story appear four headings. These identify the three elements General Convention assigned to be examined – "[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return" – plus ESG, because ESG is often used to implement guidelines.

Dioceses

Episcopal Diocese of California

Investing Diocesan assets with DFMS

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
DFMS	**DFMS**	**DFMS**	**DFMS**

The Episcopal Diocese of California has investment responsibility for about $28 million in assets. About half, or about $14 million, consists of assets belonging to the Diocese. Income and proceeds from these assets are used to support the annual diocesan operating budget and other Diocesan funded purposes and programs. The other half, also about $14 million, is comprised of assets held by the Diocese for the benefit of third parties, such as congregations, camps, and other institutions. Income and proceeds of these assets support those institutions.

In 2015 the Diocesan Investment Committee undertook to determine how the Diocese should invest these assets in a socially responsible manner, such as by using environmental, social and governance (ESG) factors in management.

As called for by a resolution passed by Diocesan Convention in 2015, the Diocese formed a task force on socially responsible investing. The task force studied the issues, met with numerous interested parties and bodies, did a diocesan-wide online survey of views on socially responsible investing and considered the impact of resolutions passed by Diocesan Convention. Both actions of Diocesan Convention and the results of the survey provided support for implementing responsible investing. The investment manager previously engaged to manage most of the Diocesan assets was not then using ESG. It appeared that some time could be expended and cost incurred if the Diocese sought to remain with this manager while this manager developed ESG capacity or found another solution.

The Diocesan Investment Committee considered the work of the task force and discussed possible actions. As a result of this effort, the Committee recommended that the Diocesan Executive Council cause the Diocese to invest all the assets held by the Diocese with The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (the Domestic and Foreign Missionary Society or DFMS), the corporate entity holding and managing investment assets for The Episcopal Church as a denomination. As well as holding and investing assets for TEC itself, DFMS, in a manner similar to that of a mutual fund, holds and invests assets for numerous entities in TEC.

The Investment Committee found DFMS's returns to be competitive over several years. The Committee felt administration would be readily managed and cost-effective. The Investment Committee decided that the Diocese would have the benefit of DFMS's socially responsible investment actions, because DFMS was supposed to invest in accordance with socially responsible guidelines or mandates adopted by General Convention and Executive Council.

Diocesan Executive Council approved the move recommended by the Investment Committee. The Diocese moved its investment assets to DFMS at the end of 2016.

Episcopal Church in Connecticut/Episcopal Diocese of Connecticut

Reflecting the values of the Episcopal Church in environmental stewardship, social responsibility and corporate governance (ESG)

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**No**	**No**

In 1863 the Episcopal Diocese of Connecticut/Episcopal Church in Connecticut (ECCT) established a separate corporation, Donations and Bequests for Church Purposes, Inc. (D&B), to hold and invest assets of the Diocese and of parishes and organizations in the Diocese. D&B has about 130 participants, consisting of about 120 parishes and 10 other organizations, including ECCT and organizations related to ECCT. The Fund's assets have a combined market value of about $128 million, of which ECCT owns about $55 million and parishes and other institutions own about $72 million.

D&B maintains two pooled investment funds: the Balanced Fund and the Values Investment Fund (Values Fund). The first has assets totaling about $123 million as of June 30, 2020, and the second has assets totaling about $5 million as of that date.

In 2018, in response to advocacy by D&B Trustees, ECCT and D&B created the Values Fund as an alternative vehicle for D&B investors. The Values Fund is managed to "reflect the values of the Episcopal Church in areas of environmental stewardship, social responsibility and corporate governance ('ESG' Performance)."

The Values Fund became operational with ECCT's transfer of some $4.6 million of ECCT assets from the Balanced Fund to the Values Fund. ECCT, the D&B Trustees and Balanced Fund investors are pleased with the performance of the Values Fund, showing a small measure of out-performance versus the Balanced Fund. Consideration may be given in the future to transferring additional ECCT assets to the Values Fund and to encouraging parishes and other investors to become ESG investors through switching from the Balanced to the Values Fund.

Episcopal Diocese of Massachusetts

The Trustees of Donations respond to Diocesan Convention and, to address a moral concern, create a fossil fuel free alternative stock fund for Diocesan Investment Trust participants

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

In the Episcopal Diocese of Massachusetts, the Diocesan Investment Trust (DIT) provides management of investment assets for the benefit of the Diocese, the Cathedral Church of St. Paul, 131 congregations (out of the 184 in the Diocese), and 14 other organizations affiliated with the Diocese. The 147 participating institutions have over 900 separate accounts in the DIT, which was organized in 1939. The DIT is managed and operated by the Trustees of Donations to the Protestant Episcopal Church (TOD), a corporation founded in 1810 that is separate from but related to the Diocese. Due its corporate history, including the merger of a Diocesan corporation into the TOD more than half a century ago, the TOD has a board of trustees, 28 in number, the members of which are chosen in various ways. Three of these are officers of the Diocese who serve on the TOD board *ex officio*. Of the others, five are appointed by the Bishop, five are chosen by Diocesan Convention, and the remaining 15 are self-perpetuating.

Assets invested in the DIT with respect to any participant may be of two types, depending on the ownership of the assets. Such assets may be (1) trust fund assets, if they are assets benefiting a participant that are subject to a trust for which TOD is the trustee, or (2) “agency” fund assets, if they are owned outright by the participant. The difference may be described in a somewhat more legalistic way as follows: With “agency” fund assets, both legal and beneficial ownership lie with the participant organization. With trust fund assets, beneficial ownership lies with the participant organization, while legal ownership lies with the TOD.

A parish, congregation or other institution that decides to invest its own assets in the DIT does so by opening an “agency” account. The organization exercises complete discretion over such an account. Such an account can be closed by the owner at any time, and the owner is free to allocate assets in the account in and among the DIT’s three investment alternatives.

The DIT’s trust fund accounts were established differently. These accounts, the oldest of which dates back to 1810, were created by grantors who named the TOD as trustee for a named beneficiary, such as the Diocese or a parish. As indicated above, the TOD is the legal owner and the participant organization is the beneficial owner. As trustee, TOD is responsible for allocating the balances in trust accounts in and among DIT investment alternatives. TOD also is required to assure that distributions are made in accord with the governing trust instruments.

As of June 30, 2020, the DIT managed assets with about $237 million in total value. Of this, five percent, approximately $12 million, represented assets for the benefit of the Cathedral. Thirty-one percent, about $73 million, represented assets for the benefit of the Diocese. The remainder, valued at just under $152 million, represented assets for the benefit of participating parishes/congregations and other participating organizations.

Of the $237 million in total assets, just under $100 million, or about 42% were trust fund assets. The remaining 58% were agency fund assets. Of the $73 million in assets for the benefit of the Diocese, about $30 million were Diocesan agency funds and about $43 million were trust funds.

Before 2015, the TOD offered participants two funds, the Stock Fund and the Income Fund, the latter focused on bonds. Also, before 2015, the DIT excluded gambling, tobacco and coal mining companies from the Stock Fund. These exclusions may be seen as traditional "sin stocks," but they were based on ethical views recognized by the Diocese and also by the TOD.

In November 2013 Diocesan Convention passed a resolution that "called upon" the Trustees of Donations to "design an alternative investment vehicle" for DIT participants "that is free from fossil fuel production companies, …[and] might also include companies that… invests [sic] significantly in clean renewable energy." In the next two years the Diocese and TOD took steps to respond affirmatively to that call from Diocesan Convention.

In November 2015, with an $8 million pledge by the Diocese in hand, the TOD and the DIT launched the Diocesan Fossil Fuel Free Fund. The new fund excluded the same gambling, tobacco and coal mining companies already excluded from the Stock Fund. To be fossil fuel free, the new fund screened out companies deriving more than five percent of revenues from fossil fuel production and also affirmatively allocated five percent of assets to companies that produce alternative energy, "green" buildings, and energy efficiency and pollution prevention technologies. This alternative was designed to be managed passively and to track a custom benchmark selected by the Financial Advisory Committee of Diocesan Council.

In November 2015, in explaining the new Fossil Fuel Free Fund to participants, the TOD wrote that the new fund had been created "to address a moral concern":

> *Participants should keep in mind that the Diocesan Fossil Fuel Free Fund has been created to address a moral concern and that its returns will be affected (for better or worse) by the absence of investments in most of the Energy sector, a sector whose stocks comprise a large segment of the investable universe. In addition to our own Diocese's decision to invest a portion of its assets in this new fund, you should also be aware that the National Church has voted to divest its endowment from fossil fuels. While as trustees, we are legally required to make recommendations based on investment merit alone (a constraint that prevents us from investing trust fund assets in this new fund), we are pleased to offer this Stock Fund alternative to agency fund participants who wish to direct a portion, or all, of their Stock Fund investments to it.*

As the above indicates, DIT trust fund assets are only invested in, and allocated between, the Stock and Income Funds. Owners of agency funds may invest them in the Fossil Fuel Free Fund.

As of June 30, 2020, the three funds offered by the TOD and DIT had the following approximate values, respectively: the Stock Fund, $136 million; the Income Fund, $85 million, and the Fossil Fuel Free Fund, $16 million. Of the $16 million in the Fossil Fuel Free Fund, the Diocese's agency assets comprise just under $10 million, or about 63% of the Fossil Fuel Free Fund. The remaining 37% is held by congregations/parishes and other institutional participants in the DIT.

TOD is a member of the Interfaith Center on Corporate Responsibility (ICCR), the premier interfaith shareholder engagement organization in the United States. TOD votes its proxies for companies in both the Stock Fund and the Fossil Fuel Fund in line with the work of ICCR and the guidelines on proxy voting maintained by the Executive Council's Committee on Corporate Social Responsibility (CCSR) and DFMS.

The Fossil Fuel Free Fund includes investments made for responsible social and environmental outcomes as well as financial return. These may be considered "impact investments."

Episcopal Diocese of Michigan

With a history of commitment to community investing, choosing low cost mutual funds and ETFs that have sustainability/ESG values acceptable to the Diocese

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes, through fund selection**	**Yes, through selected funds**	**Yes**

In 1932 the Episcopal Diocese of Michigan established a separate corporation, the Trustees of the Protestant Episcopal Church for the Diocese of Michigan (the Trustees Corporation), to hold, manage, and invest assets of the Diocese as well as assets of parishes or congregations and agencies related to the Diocese. The governing board of the Trustees Corporation is its board of trustees. The governing board members (styled as the Trustees) include the Bishop *ex officio* and 16 others, four clergy and 12 lay, who are elected by the Diocesan Convention.

In 1967 the Trustees Corporation established the Growth and Income Fund (the Fund) as a collective trust fund to hold and invest assets committed to the Trustees Corporation. The Fund currently has 54 participants, consisting of the Diocese and two Diocesan entities, four agencies related to the Diocese, and 47 congregations. The Fund has a combined market value of about $40 million, of which the Diocese (and its entities) own about $22 million, while the remaining $18 million is owned by the other participants, the congregations and agencies.

A decade or so ago the Fund's assets were under active management and largely held directly in equity and fixed income securities. Since then the Trustees have transitioned the Fund to a passive investment model with a broadly diversified portfolio. Now the Fund is invested entirely in low cost, good performing mutual funds, including index funds, and exchange traded funds (ETFs). With advice and support of an investment consulting firm, the Trustees themselves have designed the portfolio and selected the mutual funds and ETFs to be held by the Fund. The Trustees regularly review the asset allocations among mutual funds and ETFs, and the performance and costs of these funds, and change allocations and funds as they determine appropriate.

The Trustees created this portfolio to meet the growth and income expectations of the Fund’s participants at low cost and to simplify administration. As suggested above, the use of ETFs and mutual funds not only keeps costs low, but by investing in a selection of such funds the Trustees can establish a diversification spread that could be difficult to achieve with direct investments and then only with much higher expenses.

In 2003, before adopting a passive investment model, the Trustees adopted socially responsible investment guidelines for all assets held in the Fund. When adopted, these guidelines were incorporated into the Investment Policy Statement (IPS) for the Fund. These guidelines set negative screens for the Fund portfolio by reference to the no-buy lists maintained by DFMS based on the work of Executive Council’s Committee on Corporate Social Responsibility (CCSR).

As noted above, all the Fund assets are held in passively invested mutual funds and ETFs, that is, pooled investment vehicles. Investors in such vehicles cannot screen anything out of any such vehicle, whether an ETF or mutual fund, because an investor has no say over what is put into the pool by the manager of the vehicle. Therefore, the Fund’s negative screens cannot be directly applied to investments of the sort in the current portfolio.

However today there exist many ETFs and mutual funds, including index funds, created to apply environmental, social and governance (ESG) factors and sustainability analyses in their design and operation, both negatively and positively. Accordingly, an investor who wishes to do so may find a number of such funds to choose from. The Trustees thus can choose among a number of pooled sustainability/ESG vehicles with different philosophies and goals.

In designing the Fund portfolio and choosing funds and ETFs, the Trustees look at the asset classes available and the financial performance and costs of the pooled vehicles they are considering. They also look at the ESG/sustainability philosophy and performance of such pooled vehicles, applying the Fund’s negative criteria.

For some years the funds in the Fund’s portfolio have included some sustainability/ESG funds and/or ETFs that invest in alternative energy companies. The Trustees may have chosen them because, in their judgment, the funds fit the negative screens of the Diocese, but in fact the funds make affirmative uses of the assets in their pools. Accordingly, the Trustees must, at least, find those affirmative uses acceptable, ethically, to the Diocese, even if they are not the basis of the Trustees' choices. Thus, the Fund and the Diocese, investing purely passively, have become both negative and positive sustainability/ESG investors.

Separately from the Fund, the Diocese holds investment capital in Opportunity Resource Fund (OppFund), a tax-exempt, nonprofit community development financial institution (CDFI). The Bishop is a member of the OppFund advisory board.

In 1988, following action at the General Convention (which met that year in Detroit), the Diocese formed the McGehee Economic Justice Fund as an economic justice ministry. This fund was named after Bishop Coleman McGehee, then Diocesan Bishop, who was a strong proponent of the ministry. The McGehee Fund thereafter became an interfaith loan fund and then in 2004 merged with the Michigan Housing Trust Fund to form the Michigan Interfaith Trust Fund (MITF). In 2010 MITF became Opportunity Resource Fund.

OppFund uses investor capital, including that provided by the Diocese, to finance community development loans to individuals and organizations that have historically been denied access to capital by traditional institutions. At the end of 2019, OppFund had in place across Michigan over $13 million in loans for affordable housing, small business creation and other forms of community development.

Episcopal Diocese of New York

In response to the Gospel, applying responsible investing comprehensively to promote the Diocese's mission: to contribute to a more just, sustainable and peaceful world

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

Background

In the Episcopal Diocese of New York there exist two sets of investments under oversight of the Diocesan Convention and Bishop. The Diocesan Trustees manage assets owned by the Diocese. The Trustees of the Diocesan Investment Trust (DIT) manage assets held by the DIT in trust for the benefit of parishes and other institutions that have entrusted them to the DIT. About half the Diocesan Trustees are elected by Convention and about half appointed by the Bishop, while Convention elects DIT Trustees. Serving *ex officio* as a trustee of each body, the Bishop presides over each. Diocesan assets stand at about $54 million, while DIT assets add up to about $91 million. For years the Diocesan Trustees have invested some Diocesan assets in the DIT. Now that amount is about $11 million, so without overlap the two funds total about $134 million.

As outlined below, both the Diocese and the DIT have committed to sustainable investing and to applying environmental, social, and corporate governance ("ESG") factors in managing their investment assets, and the Diocese has created a community development investment program.

In 2013 climate change, the burning of fossil fuels, and fossil fuel divestment were issues in the Diocese. The Committee on the Environment (now the Committee on the Care of Creation) of the Diocesan Social Concerns Commission was addressing these matters through a number of measures, including a program of energy audits and energy efficiency improvements for parishes and through advocacy within and without the Diocese.

In November the Committee proposed a resolution to the 237th Diocesan Convention that did not mention divestment or any issue but took a broad approach. In adopting the Committee's proposal, Convention asked the Bishop, "in consultation with the Committee on the Environment and the Diocesan Investment Trust, to appoint a Task Force to study the merits of socially and environmentally responsible investing for The Episcopal Diocese of New York."

Task Force on Socially and Environmentally Responsible Investing

The Bishop appointed the task force in 2014. As directed by Convention, the Bishop consulted with the Committee on the Environment and the DIT. The membership of the task force reflected the diversity of the people of the Diocese. The Bishop appointed a former President of the DIT and a Trustee of the Diocese, both of whom were lay people with experience in socially and environmentally responsible investing (SERI). In addition, the Bishop appointed a lay non-Trustee member of the Investment Committee of the Trustees, the chairs of the Committee on the Environment and of the Social Concerns Commission (both priests), two younger members of the clergy, and a younger lay person. The Bishop also appointed a professor of environmental medicine and another lay person with experience in SERI, who was appointed chair. The task force included, *ex officio*, the Treasurer, the Chancellor, and the Diocesan Chief of Finance and Operations.

As noted, the resolution did not mention any issue but directed the task force to "study the merits of socially and environmentally responsible investing." Accordingly, the task force undertook a comprehensive study of investors' use of SERI to engage with issues broadly.

The members reviewed literature and did research. The professor taught the others about the effect of burning fossil fuels on human health. The chair prepared a report on the social and environmental issues that Diocesan Convention resolutions had addressed from 1960 to 2014.

The task force held two plenary meetings with experts. At one the task force met with two senior officers of the United Church of Christ who were responsible for investing UCC pension funds and endowment funds, to learn how that denomination applied the principles of SERI. At the other the task force met with a senior officer of a national community development financial institution (CDFI) to learn about the community investing industry and CDFIs. Task force members also met with vestries and investment committees of two parishes. In addition, task force members met with Diocesan Trustees and, another time, with DIT Trustees. Task force members attended a meeting of the Committee on the Environment, and the chair and members of the Diocesan Trustees Investment Committee met with the task force.

Anglican Communion Environmental Network

While the task force was studying SERI, the chair of the Anglican Communion Environmental Network (ACEN), the Most Rev. Dr. Thabo Makgoba, Archbishop of Cape Town and Primate of the Anglican Church of Southern Africa, called a meeting of bishops. Sixteen Anglican bishops whose people and dioceses around the globe were threatened by climate change met in South Africa with the Archbishop in February 2015. Among these was the Bishop of New York. (Hurricane Sandy had struck New York City in October 2012 and had inflicted serious damage, including on Diocesan churches and institutions, especially on Staten Island.)

On Ash Wednesday these bishops issued *The World Is Our Host – a Call to Urgent Action for Climate Justice*. They made eighteen proposals. On Church investments, the bishops said:

> *"We call for a review of our churches' investment practices with a view to supporting environmental sustainability and justice by divesting from industries involved primarily in the extraction or distribution of fossil fuels.*
>
> *"We call for the strengthening of ethical investment guidelines to include consideration of justice for the non-human creation as well as the interests of future generations of humanity." p. 6, ¶¶ 6 & 7*

In *The World Is Our Host* the bishops wrote words that the task force – and the Trustees – took as a touchstone: "*the climate change crisis is the most urgent moral issue of our day.*" p. 7, ¶ 2

Actions by Diocesan Investment Committee and Trustees

In November 2013 the Diocesan Trustees Investment Committee had engaged the Church Investment Group (CIG) as investment manager. CIG is a not for profit investment manager that serves institutional investors related to the Episcopal Church; CIG is now a signatory of the UN Principles for Responsible Investment (PRI). The Diocesan assets were fully invested under CIG's management in April 2014. In February 2015 CIG made recommendations to the Committee regarding adopting an ESG approach. (The recommendations were implemented by the Investment Committee in 2016, after the Diocesan Convention acted in November 2015.)

At the Diocesan Trustees' June 2015 meeting, prompted in part by *The World Is Our Host*, the Investment Committee actions outlined above, and the ongoing work of the task force – but before that work was completed – the Trustees took a significant step to guide the Diocese toward responsible investing. The Trustees unanimously approved the following resolution:

> *The Trustees of the Diocese of New York hereby undertake that, by Diocesan Convention in 2016, (1) the Trustees, as fiduciaries of funds of the Diocese, working with the Trustees'*

Investment Committee and others, as appropriate, will complete a substantive review, grounded in the faith and mission of the Church, of the Diocese's investment policies and practices for funds whose management is overseen by the Trustees, with a view to adopting ethical investment guidelines, to include, among other things, consideration of justice for the non-human creation as well as the interests of future generations of humanity and supporting environmental sustainability and justice, including by considering divesting from industries involved primarily in the extraction or distribution of fossil fuels, (2) after that review, the Trustees will take appropriate steps to cause the implementation of the results of the review, and (3) the Trustees will report this current action to the Diocesan Convention in November 2015 and report the results of the review and the implementing steps to the 2016 Diocesan Convention.

Task Force Recommendations

Drawing on what it had learned through its broad study, including from *The World Is Our Host* and the Trustees' actions outlined above, the task force prepared a report to the Diocese, published in September, two months before the 2015 Convention. If adopted by Convention, the task force recommendations would apply to institutional investors in the Diocese, including parishes, as well as the Diocese itself and the DIT.

(However, although the task force addressed shareholder engagement in its report, it decided not to make any recommendations on that. While the task force was at work, Convention acted on its own. At Diocesan Convention in 2014, Convention by resolution affirmed the commitment of the Diocese and DIT to vote proxies, to undertake shareholder engagement, and align such actions with those of The Episcopal Church. That is Diocesan policy today.)

Diocesan Convention

On November 15, 2015, the 239th Diocesan Convention received the task force's report and recommendations. On the Convention floor the only comments were affirmations of the task force's work, report and proposals. The Convention voted to adopt the task force's proposed resolutions without amendment, by an overwhelming show of hands.

By its actions Diocesan Convention made the following decisions and recommendations:

(1) that the Diocese establish a community development investment program;

(2) that the Diocese adopt sustainable investing as an investment policy goal and become a signatory to the UN Principles for Responsible Investment;

(3) that the governing body (whether called board or vestry) of the Diocese, of the DIT, of every entity related to the Diocese, and of every church, parish, or congregation in the Diocese,

(i) carry out a substantive review of its own investment policies and practices for management of Church investment assets in light of its understanding of the Church's faith and mission, including the Church's social and environmental responsibilities;

(ii) develop ethical guidelines for socially and environmentally responsible investing, including consideration of justice for non-human creation, the interests of future generations of humanity, and support for environmental sustainability and justice; and

(iii) consider divesting from fossil fuel industries, particularly coal companies; and

(4) that the Diocese itself divest from coal.

Implementation: Trustees of the Diocese

Three of the recommendations made by Diocesan Convention were directed solely to the Diocese. These were: (i) establish a community development investment program, (ii) adopt sustainable investing as an investment policy goal and become a signatory to the UN Principles for Responsible Investment, and (iii) divest from coal.

In 2016 the Trustees adopted sustainable investing as an investment policy goal. The Trustees continue to consider having the Diocese sign on to the PRI. For institutions committed to sustainable investing but hesitating to sign on, commonly the PRI reporting requirements are the reason; for the Diocese, the question comes down to staffing.

In 2017 the Trustees implemented the recommendation that the Diocese establish a community development investment program. The Investment Committee has invested endowment assets directly in a community development financial institution (CDFI) located in New York City that provides assistance, training and capital to immigrants and refugees. The Committee also has invested endowment assets in a fixed income investment pool that targets economic development in the geographic territory of the Diocese, that is, in the New York counties of Westchester, Putnam, Dutchess, Ulster, Rockland, Sullivan and Orange, and the New York City boroughs of Staten Island, Manhattan and the Bronx. With these investments, the Diocese has now invested over $1 million in community development loans.

The fourth recommendation adopted by Diocesan Convention was directed to the Diocese and other institutional investors in the Diocese, including parishes. This recommendation may be summarized as "develop ethical guidelines for socially and environmentally responsible investing" and "consider divesting from fossil fuel industries."

As noted above, even before the task force made recommendations to Diocesan Convention, the Trustees of the Diocese had decided to carry out a review of the Diocese's investment policies and practices with a view to adopting ethical investment guidelines and to considering divesting from fossil fuel industries. That review was completed after Convention acted, and the Trustees, on recommendation of the Investment Committee (and CIG), adopted a new Investment Policy Statement (IPS) on December 1, 2016. The IPS states its purpose as follows:

> In response to the Gospel, to the challenge of responsible stewardship and to the Church's ethical teachings, the Diocese makes investment decisions taking into consideration both economic and financial factors and social justice and environmental justice factors. The Diocese is a steward of the financial gifts it has received. The Diocese has the responsibility to cultivate these gifts in order to promote the Gospel and to further the mission of The Episcopal Church and the Episcopal Diocese of New York.
>
> It is the investment policy of the Diocese to seek investment return that supports financially the mission of the Diocese and at the same time to consider justice for all humanity, justice for nonhuman creation, the interests of future generations of humanity, and support for environmental sustainability and justice.

The IPS further states:

> In evaluating potential investment strategies, priority shall be placed on identifying investments that are aligned with the Diocese's mission of contributing to a more just, sustainable, and peaceful world. … The Diocese seeks over time to invest in funds that specialize in generating risk-adjusted returns while also incorporating environmental, social, and corporate governance ("ESG") issues and restriction of investments in fossil fuels into investment analysis and decision-making processes.

With CIG's guidance the Diocese has engaged Brown Brothers Harriman (BBH) as the Diocese's Outsourced Chief Investment Officer (OCIO) to manage the Diocese's separate investment account with CIG. BBH is a practitioner of ESG investing and, like CIG, a signatory of the PRI. ESG factors are applied by BBH in managing all of the Diocese's investment assets.

As noted above, in 2016 the Diocesan Trustees adopted sustainable investing as an investment policy goal. Early the same year the Diocese fully divested from coal. In January 2017 the Diocese's portfolio was divested fully (and remains divested fully) from companies with significant fossil fuel reserves.

Thus, the Diocese has created a community development investment program and has committed to sustainable investing and the use of ESG for all its assets.

Implementation: Diocesan Investment Trust

The Investment Committee of the Trustees of the Diocese and the Investment Committee of the DIT work together while continuing to fulfill their independent fiduciary responsibilities for the assets under their management. (As noted above, the Diocesan Trustees have invested substantial Diocesan assets with the DIT.) The DIT Investment Committee has not adopted for itself the faith-based language found in the Diocesan Trustees' IPS, but the DIT Trustees are fully aware of that language and are guided by the spirit of those words.

The DIT Trustees are also guided by the Diocese's commitment to divesting from fossil fuels. The DIT has been selling fossil fuel companies, broadly defined, out of the portfolio and will continue to do so, with the intent to reduce fossil fuel exposure close to zero over time.

The Diocesan Investment Trust for many years has engaged the Commonfund as the DIT's Outsourced Chief Investment Officer. The Commonfund is a nonprofit investment manager serving institutional endowments, private foundations and other nonprofit investors. The Commonfund has long integrated ESG principles into its investment management. Across all asset classes, 70% of the Commonfund's managers use ESG and 15% are signatories of the PRI. The Commonfund became a signatory of the PRI in 2013.

The DIT became a PRI signatory following the adoption of the task force recommendations by the Diocesan Convention in 2015. With the assistance of the Commonfund, the DIT has been able to satisfy the reporting requirements for a signatory.

As a PRI signatory, the DIT requires its managers to use ESG. The DIT Investment Policy Statement expressly provides:

> The Diocesan Investment Trust endeavors to incorporate Environmental, Social and Governance ("ESG") considerations into the management of its endowment portfolio with the understanding that such considerations align with the Principles for Responsible Investment ("PRI") and adherence to these principles may have a long term positive impact on the endowment. In furtherance thereof, the Investment Committee requires its managers to incorporate ESG factors in their analytical processes, along with other factors such as risk and return, to meet the portfolio's over all investment objectives.

Thus, the DIT has committed to sustainable investing and the use of ESG for all its assets.

Episcopal Diocese of Oregon

Polling Convention delegates to determine their socially responsible investing and Gospel value priorities and then constructing a Diocesan portfolio based on those priorities

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

Background

In 1916 the Episcopal Diocese of Oregon created a corporation, under the name "The Diocese of Oregon," to hold and manage real and personal property of the Diocese. The governing board is the Board of Trustees, and the board members are called Trustees. The Board is comprised of the Bishop, the chancellor, the secretary, the treasurer, each serving *ex officio*, and three clergy and three lay persons elected by Diocesan Convention.

In 1992, by action of the Board, the diocesan corporation established and launched the Diocesan Investment Fund (the Fund), a pooled trust fund to hold and manage investment assets for the Diocese and for congregations and other entities in the Diocese that elect to invest in the Fund. The Board appoints a Diocesan investment committee, currently comprised of nine members, three of whom are elected Trustees. The investment committee sets investment policy and oversees investment of the Fund's assets. In 2012 the committee engaged Sellwood Consulting LLC (Sellwood) as its investment consultant.

Today the Fund comprises three subfunds: the Short Term Investment Fund (the STIF, inception date 2010, with current assets of about $1.8 million), the original long term Diocesan Investment Fund (the DIF, inception date 1992, with current assets of about $28.4 million) and the long term Socially Responsible Investment Fund (the SRIF, inception date 2016, with current assets of about $3 million). The Fund assets in all the subfunds total about $33 million. Of this, about $11 million represents assets of the Diocese and related institutions. The remainder, about $22 million, represents assets of congregations and other Episcopal entities investing in the Fund. The Diocese's share of the $3 million in SRIF assets is about $2.3 million. A growing number of congregations and other institutions participate in the SRIF along with the Diocese.

Diversification and cost savings are achieved in both the DIF and the SRIF portfolios by investing primarily, but not exclusively, in low cost institutional mutual funds.

Socially Responsible Investment Fund

At the 2013 Diocesan Convention, the Environmental Commission of the Diocese presented a resolution calling on the Trustees and the investment committee to cause the Fund to divest from fossil fuel industries and re-invest in renewable energy. On the floor of Convention, a substitute motion was passed. The substitute directed that two studies be conducted. The first was to address the "effects of divestment" and the second was to address including "socially responsible investing generally in a revised investment policy."

To work on these matters, the Trustees formed an advisory committee, which came to be called the Socially Responsible Investing Committee (SRIC). The committee consisted of two Trustees, two investment committee members, and two Environmental Commission members.

Over the next two years, in consultation with the Trustees, the investment committee, and Sellwood, its consultant, and the Environmental Commission, the SRIC developed a proposal for the Diocese to undertake socially and environmentally responsible investing in a faithful way.

At the 2014 Convention, the SRIC conducted a "dot voting" exercise with delegates to poll them on issues they believed the Diocese should address through responsible investing. By placing dots on a display board stating alternatives for "socially responsible and gospel value priorities," delegates chose positive and negative priorities for investing. The delegates rated "Climate and clean technology" and "Human Rights" as the top two positive Gospel value priorities and "Pollution and toxics" and "Human Rights" as the top two negative priorities.

At the 2015 Convention the SRIC submitted three resolutions calling for a subfund to be created in the Fund, the "Socially Responsible Investing Fund," to "*reflect contemporary standards of socially responsible investing in addition to the gospel values priorities made known by Convention Delegates during a polling process conducted by the Socially Responsible Investment Committee (SRIC) at the 2014 Diocesan Convention*." Convention enacted all three resolutions.

By these actions the Convention not only directed creation of the SRIF, it directed that, to launch the SRIF, the Trustees were to transfer into it one-third of the funds invested in the DIF under their control. Convention also specified that, every three years, Convention delegates should be polled on their current Gospel value priorities and on the fraction of Diocesan assets to be invested in the SRIF. Convention also required that the Trustees endorse the Episcopal Church's decision to support the UN Sustainable Development Goals (SDGs) by authorizing the SRIF to invest to achieve the SDGs and authorizing micro-finance investments in its portfolio.

Finally, the resolutions directed the Trustees "to appoint a standing multi-stakeholder committee…to study any issues/concerns regarding SRI investment, divestment, reprioritization of SRI/Gospel Values," to assist the Board "to communicate information regarding" the SRIF, and to "undertake the triennial polling… relative to the SRI/Gospel Values priorities… and preferred percentage of Diocesan… assets to be allocated to the SRIF."

Stakeholder Advisory Committee

The new SRI Stakeholder Advisory Committee (SAC) includes members from participants in the SRIF. By design the SAC has become the link between the Trustees, the investment committee, Sellwood, its investment consultant, and SRIF participants and others in the Diocese concerned with the SRIF. In 2017, using dot-voting, the SAC polled Convention delegates again on their "SRI/Gospel Values priorities." The 2014 results were confirmed and priorities expanded. The next poll has been postponed because the 2020 Convention will be held online, not in person.

Constructing and managing the SRIF Portfolio

The investment committee, with advice of Sellwood, its consultant, and in consultation with the SAC, uses the delegates' SRI/Gospel value priorities to design and construct the SRIF portfolio. The positive investing values used now are *Climate & Clean Technology*, *Human Rights*, *Community Development*, and *Diversity/Equal Opportunity*. The negative ones are restrictions regarding *Pollution & Toxics*, *Human Rights*, *Executive & Exploitative Pay*, and *Animal Cruelty*. In response to Convention, the investment committee allocated 0.7% of the SRIF portfolio to micro-finance investments in support of the SDGs.

By investment committee decision, both the DIF and the SRIF invest in pooled vehicles such as mutual funds. With such a vehicle, an investor cannot choose the securities in the pool. Thus, for the SRIF portfolio, the committee selects a pooled vehicle based on its judgment, informed by advice of Sellwood and the SAC, about how the vehicle's investment purposes, program and performance fit with the Diocese's SRI/Gospel value priorities. In fact, today numerous pooled vehicles have been created and are managed to focus on environmental, social and governance (ESG) issues and to apply sustainability analysis in managing assets. If a pooled fund does not perform as expected, the committee can sell it and choose one of the many others available.

At present the SRIF portfolio comprises mutual funds and one separately managed account. In setting the duties and responsibilities of the manager for that account, the committee applied the SRI and Gospel value priorities to define the Diocese's expectations.

Below is a table published by the Diocese on the SRIF's manager structure as of June 30, 2020.

GOSPEL VALUE PRIORITIES

The SRIF seeks to incorporate the top socially responsible investing (SRI) and gospel value priorities identified via dot voting at the 2014 Convention, and most recently affirmed and expanded in 2017. These values encompass both positive investment, a proactive approach to socially responsible investing, and divestment, which is restriction-based. The Committee recognizes that, in isolation, each investment may not address all of the gospel value priorities, but the SRIF in whole will emphasize each of these priorities.

Positive Investing Investors direct money toward solution-oriented securities and invest in companies that have a positive social impact.	**Divestment** Investors restrict investment in certain securities based on SRI factors, excluding restricted securities from a portfolio.
Climate & Clean Technology	Climate & Clean Technology
Human Rights	Human Rights
Community Development	Community Development
Diversity/Equal Opportunity	Diversity/Equal Opportunity

INVESTMENTS

The Diocesan Investment Committee meets quarterly with the SRIF's consultant, Sellwood Consulting LLC, to review the Fund's performance, asset allocation and manager structure, including performance of the individual investment managers. The Investment Committee and/or Sellwood meet with each investment manager on an ongoing basis to discuss investment results, strategy, outlook for the future and any changes or issues within the firm or investment team.

Growth Investments		
U.S. Equity | 42.0%		
PRI, Fossil-free	Parametric Responsible Investing	A separately managed U.S. equity portfolio optimized to track the Russell 3000 Index and meet the SRIF's customized social screening criteria.
Non-U.S. Equity | 14.0%		
PRI, Fossil-free	Boston Common ESG Impact Intl	A mutual fund that invests in non-U.S. companies with sound governance and responsible financial management, capable of consistent profitability.
Global Equity | 12.0%		
PRI, Fossil-free	Pax Global Environmental Mkts	A mutual fund sub-advised by Impax that invests globally in companies in rapidly growing Resource Optimization markets.
Diversifying Investments		
Real Estate | 3.0%		
	Third Avenue Real Estate	A mutual fund that employs a fundamental, value-oriented approach to construct a global real estate portfolio, that can invest in any industry, region or part of a firm's capital structure.
Marketable Alternatives | 4.3%		
PRI	PIMCO All Asset Inst	A mutual fund with a "real return" strategy, investing tactically across PIMCO funds.
PRI	BlackRock Multi-Asset	A mutual fund that tactically invests in income-oriented strategies across the globe.
Micro-Finance | 0.7%		
	Craft3	A nonprofit community development loan fund that serves communities in OR and WA
Equity Risk Mitigation		
Fixed Income | 22.0%		
PRI	PIMCO Total Return ESG	A mutual fund that invests across all sectors of the bond market, with ESG-focused portfolio construction and robust issuer engagement.
PRI	TIAA-CREF Core Impact Bond	A mutual fund that invests in U.S. bonds, focusing on undervalued, investment-grade securities and proactive social investments.
Cash | 2.0%		

PRI United Nations Principals of Responsible Investing signatories

Fossil-free investment

The above table identifies with a graphic symbol those investments in the SRIF portfolio that are “fossil-free.” With another symbol the table identifies the SRIF portfolio managers that are signatories of the UN Principles of Responsible Investing (PRI). Eight out of ten are signatories.

Over 90% of the SRIF portfolio funds and managers use ESG in their investment process. In fact, the only SRIF investments that are not chosen using ESG are in the asset classes *marketable alternatives*, *real estate*, and *cash.*

The Investment Policy Statement (IPS) adopted by the investment committee, most recently in February 2019, includes an Exhibit B specifically stating investment policy applicable to the SRIF. That policy statement sets out for managers the Diocese’s positive and negative SRI and Gospel value priorities as discussed above. Exhibit B to the IPS also provides: “In addition to providing data as is required for proper investment monitoring, managers for the SRIF will be expected to provide to the [investment] Committee on an annual basis a detailed report regarding how the portfolio was managed to further the SRI priorities outlined in this policy.”

In addition, the IPS states that the investment screens decided by the Episcopal Church and published from time to time by DFMS (the “no-buy” lists) apply for separately managed accounts for both the DIF and the SRIF. As indicated above, in the case of the SRIF, the separately managed account now in place has been set up to comply with the Diocese’s SRI and Gospel value priorities.

The IPS further provides that, for separately managed accounts, the Diocesan staff votes proxies for each security in the account, following the proxy voting policy adopted by DFMS, based on the work of CCSR, and implemented through the proxy voting service provided to Episcopal Church institutions by the Church Pension Group.

For pooled funds, the IPS provides, as it must, that the investment manager of the pooled fund votes proxies on behalf of all pooled fund investors. However, as noted above, pooled funds in the SRIF portfolio have been chosen by the investment committee because the funds’ purposes and investment programs fit with the Diocese’s socially responsible and Gospel value priorities. If the pooled funds purposes and programs are consistent with Diocesan value priorities, then voting proxies consistent with those purposes and programs also should be consistent with Diocesan value priorities. Indeed, in investing in such a pooled fund, the investment committee expected the fund managers to vote fund proxies consistent with the pooled fund’s purposes.

Although not explicitly required by the IPS, but consistent with the expectations of the investment committee, SRIF managers also actively take on shareholder engagement and advocacy efforts in respect of the assets under their management. In the case of mutual funds or other pooled vehicles, the investment committee expects the managers to engage and advocate consistent with the pooled vehicles’ purposes.

In addition to the environmental, social and governance results expected of the SRIF portfolio, good financial returns are expected. In fact, the SRIF portfolio has outperformed its peers financially since its 2016 inception. For the period the SRIF has returned 8.3% net of fees and ranks in the top 7% of similar sized institutional peers. The DIF, with a record of success dating back to 1992, has returned 7.5% net of fees and ranks in the top 18% of institutional peers.

Those engaged most closely with the SRIF intend to work to have the Diocese increase significantly its investment in the SRIF.

Episcopal Church in Vermont/Episcopal Diocese of Vermont

Investing for social and environmental sustainability in response to our Gospel imperative

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	**Yes**	**Yes**	**Yes**

Background

In 1880 the Episcopal Church in Vermont/Episcopal Diocese of Vermont (Diocese) incorporated the Trustees of the Diocese of Vermont (the Trustees Corporation) to hold title to all diocesan real and personal property. The eight members of the governing board of the Trustees Corporation are styled “Trustees of the Diocese” or “Trustees.” The Bishop of the Diocese serves *ex officio* as a member of this board. On nomination of the convention Nominating Committee, the Diocesan Convention elects the other seven Trustees, one at each annual convention, to hold office for seven years. Three elected Trustees are appointed by the full board to serve as a corporate investment committee (the Investment Committee). The Bishop and the President of the Board of Trustees serve *ex officio* on the Investment Committee.

About 40 years ago the Trustees Corporation established the Diocesan Unit Trust Fund (the Fund), a pooled trust fund to hold and manage investment assets for the Diocese and its related institutions and for congregations and parishes and other entities in the Diocese that elect to invest in the Fund. The Investment Committee sets investment policy and oversees investment of the Fund’s assets. The Fund has a current value of about $30 million, of which about $10 million represents assets of the Diocese and its related institutions. The remainder, about $20 million, represents assets of parishes, congregations and others investing in the Fund.

Around 2010 there began to be turnover in the membership of the Trustees (that is, the governing board of the Trustees Corporation) and thus in the Investment Committee. The newer members began to push the Fund toward engaging more seriously in socially and environmentally responsible investing. They undertook a multi-year effort to educate themselves and then to change the Fund's approach to investing, to change its portfolio, and to report to the participants in the Fund and the people of the Diocese on what they proposed and what they were doing.

In 2016, in the most visible formal step toward such a new approach, the Investment Committee and Trustees adopted a new Investment Policy Statement (IPS) for the Fund. About the same time the Investment Committee undertook to engage an investment advisor specifically to operate under the IPS. Through these steps the Trustees and Investment Committee made substantial changes in the management of the Fund's assets. Since 2016 the Investment Committee and Trustees have continued to develop the Fund's approach to responsible investing, and they have revised the IPS, as needed, accordingly.

Our Gospel Imperative

One change introduced for the first time in 2016 and not altered since was the adoption by the Trustees of a statement of *Our Gospel Imperative*. The IPS includes the following declaration as the sole statement on its first page:

Our Gospel Imperative

> *We the Trustees of the Episcopal Diocese of Vermont believe that our foremost Gospel imperative is to be wise stewards of the resources under our care. Our first priority, therefore, is to ensure that Diocesan investments provide a growing and sustainable source of disbursable funds over the long term. We also believe that Diocesan resources can be a force for good in our world. Through our investments and actions, we seek to encourage corporate social responsibility; through targeted local investing, we seek to care for our neighbors.*

Then, in its Statement of Objectives, the 2016 IPS set out two investment objectives.

First the IPS stated the following objective: to achieve "a long-term rate of return on assets that will generate earnings to provide a sustainable and increasing level of income to support the current and future ministries of the Diocese and its co-investors in accordance with the wishes of the donors or owners of those funds, while preserving the real (inflation-adjusted) purchasing power of the funds."

Immediately after the foregoing – explicitly linking this objective to the Gospel imperative – the IPS then stated the following: "to follow Environmental, Social and Governance (ESG) investing principles as a means of meeting our Gospel imperative." In the discussion of this objective the IPS went on to say that the "ESG investing principles used for the Fund will be updated whenever The Episcopal Church updates its own directives, in order to keep the principles of the Fund aligned with those of The Episcopal Church."

In its "Prohibited Securities" section, the IPS identified as "prohibited" the securities of companies found on the "no-buy" lists published from time to time by DFMS. The IPS attached the then current version of those "no-buy" lists in Exhibit B to the IPS. In response to a proposal adopted in Diocesan Convention, the IPS also included in the prohibited securities section the following "Additionally, the investment manager will avoid stocks of companies in the business of providing water for drinking or sanitation that abuse their monopolies or oligopolies over water sources, or distribution, or both."

The provisions discussed above have been continued through subsequent revisions of the IPS.

Investing affirmatively for sustainable social and environmental outcomes

In 2019 the Trustees brought new affirmative substance to the Diocese's investment policy. As a "clarification" of the Diocese's policy, the Trustees added a new Exhibit C to the IPS.

In this exhibit, the Trustees declared that "It is the goal of The Episcopal Diocese of Vermont to invest in a manner that not only provides for sustained growth of the Fund and needs of The Episcopal Church, but also aligns with its values." The Trustees then state: "To achieve these dual goals, we have implemented the following three-pronged approach to investing:"

1. ***Impact Investing**:* Alongside the goal of a financial return, is our desire to promote an economy that rewards social and environmental sustainability. This means investing in progressive companies that focus their efforts on making a positive impact and espousing the six U N Principles for Responsible Investing. By aligning the aspirational values of the Church with our investing strategy, we can help encourage a mindset of responsible business practices, as well as a future of all-encompassing prosperity. E.G.: Affordable Housing, Health Care and Potable Water, Renewable Energy, and Minority Owned Companies.
2. ***Invest in our Community**:* Where possible, it is our aspiration to invest in those companies that additionally benefit the local community. Vermont is a progressive state, which prioritizes environmental and social sustainability. While keeping the financial objectives stated in the IPS in mind, simultaneously boosting the local economy and communities where we live gives us the opportunity to approach aligning our financial goals with the values of the Church. E.G.: the Vermont Community Loan Fund and the Vermont Community Foundation.
3. ***Proxy Voting**:* After investing in a company or municipality, it is imperative to be active owners and ensure that their operations remain in line with the values of The Episcopal Church. To assist us with this objective, we will use the services of the Church Pension Group, which will facilitate a partnership with Glass Lewis & Co LLC, one of the largest

and most respected proxy advisory services in the world. They will perform the services under the guidelines of a Proxy Voting Policy published by The Episcopal Church.

Exhibits A and B to the IPS can be amended by the Investment Committee. This Exhibit C can only be amended by the full governing board, that is, the Trustees.

The Diocese already has invested in the Vermont Community Loan Fund, which makes loans to small business owners who cannot access credit from traditional sources. The Diocese is considering making an investment in the Vermont Community Foundation, which makes loans for affordable housing in the state.

In February 2020, the Investment Committee amended Exhibit B to the IPS to add the human rights exclusion (or screen) Executive Council adopted in October 2019 as a requirement for DFMS and a recommendation to other institutional investors in the broader Church. By so doing, the Investment Committee adopted this Executive Council recommendation as Diocesan investment policy. Exhibit B now sets out both the screen and the names of the companies put on the DFMS no-buy list by Executive Council. Thus, Vermont has adopted both the Executive Council screen and no-buy list:

Human Rights Investment Screen

Any corporation supporting or benefiting from denial of human rights consistent with policy adopted by General Convention or Executive Council, particularly;
Any corporation that supports or benefits from denial of human rights in or through the occupation of the West Bank, East Jerusalem or the Gaza Strip (the Occupied Palestinian Territories or OPT)

	CUSIP	***SEDOL***	***COUNTRY***
Caterpillar Inc.	*149123101*	*2180201*	*USA*
Motorola Solutions, Inc.	*149123101*	*B5BKPQ4*	*USA*
Israel Discount Bank Ltd.	*465074201*	*6451271*	*Israel*

Going forward, the Trustees and Investment Committee are undertaking further to educate themselves and their investment advisors to better understand and carry out the affirmative policies the Trustees and Committee have worked to define and adopt over the past decade.

Episcopal Church Context

Church Pension Fund

In response to actions of General Convention in 1913 and 1916, The Church Pension Fund (CPF) was established to provide pension benefits for clergy of the Episcopal Church. Since 1917 CPF has been the sponsor and administrator of the Church Pension Fund Clergy Pension Plan, a defined benefit plan. CPF also sponsors and administers pension plans for eligible lay employees, as well as a retirement savings plan, through which clergy and lay employees can save for their own retirement. Through CPF and affiliates of CPF other benefits and programs and services are provided to clergy and lay employees and Church institutions.

To meet the obligations under the pension and retirement plans CPF sponsors and administers, CPF holds and invests assets contributed by pension and retirement plan participants and their employers. In managing these pooled investment assets, CPF actively seeks investments that offer opportunities to realize attractive risk-adjusted returns, while also achieving important social goals and supporting Episcopal Church values, consistent with CPF's fiduciary obligations.

In its efforts to reflect Episcopal Church values in its investments, CPF has taken a proactive approach to socially responsible investing, focusing on a three-part strategy:

- *Investing for Positive Impact*

  CPF proactively seeks out and invests with managers who deliver both strong returns and positive social and environmental outcomes. Examples of CPF's impact investments that support Church values include investments in renewable energy, affordable housing, and sustainable agriculture.

- *Shareholder Engagement*

  CPF uses its position as an institutional investor to influence the behavior of companies in its investment portfolio. Working with Executive Council's Committee on Corporate Social Responsibility (CCSR), through shareholder engagement CPF has addressed issues such as diversity in corporations, human trafficking, and climate change.

- *Thought Leadership*

  CPF shares its experience as an institutional investor and its industry relationships to create awareness of effective strategies in socially responsible investing. By collaborating with other investors, CPF helps advance industry best practices and increase investments in the space.

In addition to the three main strategies of socially responsible investing, CPF has engaged with many managers of pension assets to evaluate the extent to which they incorporate environmental, social, and governance (ESG) issues into their investment analysis. ESG issues may present material investment opportunities and risks and are part of fundamental investment analysis. In many cases, the ESG issues investors find material align with the values of CPF and its beneficiaries. Considering ESG factors can help drive long-term investment returns, consistent with fiduciary duty, while also supporting Episcopal Church values.

Episcopal Church Context

The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America

Investing on behalf of the Episcopal Church to support and to carry out its Mission

The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (DFMS) is the New York not-for-profit corporation that holds and manages real and personal property for the Episcopal Church. Accordingly, DFMS holds and manages the Church's investment assets. (As described in the note at the end of this section, DFMS also holds in a custodial relation and manages investment assets that are owned by some distinct entities related to the Church and to DFMS, such as dioceses of the Church.)

As its original rather long name indicates, DFMS was incorporated to carry out "missionary" programs or activities on behalf of the Episcopal Church, both within and without the United States. To that broad end, as an incident to carrying out such programs and activities, DFMS was empowered to hold and manage property for the Church and others, as it does to this day.

Regarding investments, DFMS's principal responsibility is to hold assets for the Church in the name of DFMS and to invest them to support the Church's purposes and programs and to carry out its mission. The DFMS Investment Policy Statement as revised (as of June 2020) (the IPS) states DFMS's investment "objective" as follows : "The investment objective is a long-term rate of return on assets that will generate earnings to provide a sustainable and increasing level of income *to support the current and future ministries of the Episcopal Church in accordance with the wishes of the donors or owners of those funds*, while preserving the real (inflation-adjusted) purchasing power of the funds." (Emphasis supplied.) While the IPS principally focuses on the DFMS portfolio from the point of view of traditional professional investment management for financial return, the IPS also references ethical investment policies established by General Convention and Executive Council; see the discussion, below, of Exhibits B and D to the IPS.

The arrangements adopted by General Convention and Executive Council for DFMS to employ in carrying out its investment responsibilities have evolved in the last half century. Now these responsibilities have been shared among three committees of Executive Council: the Investment Committee, which manages the DFMS portfolio, the Economic Justice Loan Committee, which administers a community development loan fund on behalf of DFMS, and the Committee on Corporate Social Responsibility, which engages with DFMS portfolio companies on ethical concerns of the Church. Each committee is discussed in turn below.

Managing the Portfolio – the Investment Committee

Until Executive Council changed its bylaws in 1997, the committee responsible for investing DFMS assets was known as the "Trust Funds Committee." When committee members expressed concern that the committee name and job description might be construed to make them liable as trustees in the legal sense for their actions as committee members, Council agreed to revise its bylaws. The revisions provided that the newly re-named committee had responsibilities and powers appropriate for an investment committee of a New York not-for-profit corporation, such as DFMS in fact is, and that committee members would be indemnified by DFMS in accordance with law with respect to their actions as such. Since then the Committee has functioned under the revised bylaws as a corporate investment committee.

The assets DFMS holds for which the Investment Committee provides investment oversight have a value of about $500 million. The total has three components: (1) assets owned, held and managed by DFMS and benefiting DFMS, representing about $262 million of the total (DFMS's own assets); (2) assets owned, held and managed by DFMS as trustee, benefiting other Episcopal/Anglican entities, representing about $109 million of the total (trust assets); and (3) assets held and managed by DFMS as custodian but owned by and benefiting other Episcopal/Anglican entities, representing about $129 million of the total (custodial assets). An example of assets of the second sort would be assets held by DFMS as trustee of a trust set up for the benefit of a diocese located in the U.S. or another country. Custodial assets are discussed in the note at the end of this section.

The distinctions given immediately above are significant for the institutions involved and their missions, but for investment purposes, all these assets are treated alike, as a single pool. As stated in the quote taken from the DFMS IPS set out in the third paragraph above, all these assets are invested together *"to support the current and future ministries of the Episcopal Church in accordance with the wishes of the donors or owners of those funds."* About 14% of this $500 million pool is invested in hedge funds; the target for hedge funds is 16%. The remainder, over 80%, is held in publicly traded securities. These assets include no impact or community investments. The Economic Justice Loan Committee, discussed below, administers a separate pool of DFMS endowment assets set aside for impact or community investments.

The DFMS IPS references ethical concerns of the Church in two exhibits attached to and incorporated into the IPS. Exhibit B sets out *Fossil Fuel Investment Guidelines* and *Human Rights Guidelines*. Exhibit D sets out *Companies Subject to No-buy Portfolio Restrictions*. The two exhibits overlap somewhat. Their content derives from decisions on ethical issues expressed in resolutions adopted by General Convention and Executive Council.

As discussed below in regard to the Committee on Corporate Social Responsibility, DFMS now has in place portfolio restrictions – or divestment policies – adopted by Convention and Council with respect to ownership of shares in companies implicated in five issues of concern to the Church. These are defense contracting, for-profit prisons, the manufacture and sale of tobacco products, fossil fuels, and supporting or benefiting from denial of human rights. IPS Exhibit D sets out summaries of these policy decisions by Convention and Council and identifies the companies and securities comprising the no-buy lists developed under these policies.

Exhibit B, as noted above, discusses only two of these five subjects of divestment policy, those regarding fossil fuel and human rights concerns. This exhibit provides a statement of the policy decisions of the Investment Committee in response to the General Convention and Executive Council actions that set up the divestment policy in question. This human rights policy discussion largely echoes the decisions made in 2019 by Executive Council to implement a 2018 General Convention resolution on adopting a human rights “screen” for investing.

The Exhibit B fossil fuel policy discussion identifies the Investment Committee’s decisions made to implement the directives of General Convention resolution 2015-C045 (calling for fossil fuel divestment by DFMS). The exhibit then does somewhat more than speak to divestment.

Under the heading *Fossil Fuel Investment Guidelines,* this is the one place in the IPS that references “(ESG),” or the application of *environmental, social and governance factors* in investment management decisions. With respect to ESG, in this discussion the exhibit says the Investment Committee “will monitor fund holdings for compliance with” the *ESG ratings* promulgated by DFMS’s investment consultant, Mercer Investment Consulting LLC. This discussion goes on to say that the Committee will allow DFMS investment in companies and investment vehicles meeting Mercer’s ratings “ESG1 and ESG2 without hesitation; ESG3 with approval; and ESG4 only if justifiable after thorough review.” On its face, this part of the discussion does not refer to fossil fuel divestment at all.

Moreover, in this section Exhibit B also says the Investment Committee will to “continue to review investment managers that provide ESG and alternative energy themes.” In fact, General Convention resolution 2015-C045 did more than call for divestment. Resolution C045 said DFMS should “divest from fossil fuel companies *and reinvest in clean renewable energy*.” (Emphasis supplied) Thus it appears that, in deciding how to comply with the directive to reinvest in renewable energy, the Committee decided to look to application of ESG factors.

Taken together these two references to ESG in Exhibit B suggest that the exhibit is about more than fossil fuel and human rights investment guidelines. The references suggest the Investment Committee may undertake a more general application of ESG factors as the Committee constructs a portfolio or considers hiring new investment managers.

Because the three components (DFMS’s own assets, trust assets and custodial assets) that comprise the assets under management by the Investment Committee are all invested in one pool, the investment policies embodied in Exhibit B and Exhibit D apply to all of them without distinction. Thus, the divestment policies or portfolio restrictions apply to all such assets. Moreover, insofar as the Investment Committee may seek to apply ESG factors in managing the pool, any such use of ESG factors will perforce apply to all three components.

Investing for Economic Justice – the Economic Justice Loan Committee

Over three decades ago, by separate actions of General Convention in 1988 and Executive Council in 1989, the Episcopal Church set aside two amounts of endowment assets to support economic justice investment. In 1997 Executive Council united these two efforts into one and created the Economic Justice Loan Committee (EJLC) to oversee the combined program.

Through these actions, the Episcopal Church has committed $7 million in its endowment assets for economic justice initiatives around the globe and in the United States. By making financial resources and technical support available in communities that have limited or no access to credit and related financial services and education, the Church supports those communities' efforts to improve their economic well-being and simultaneously helps them empower themselves to direct and control their own economic and organizational development.

In this time the Church has supported, through investments managed by EJLC, many sorts of community economic justice development programs and projects. These have included affordable housing, the creation and growth of small businesses and micro-enterprises, social and environmental infrastructure improvement projects, programs for job creation, and the provision of social services and education, including child care programs.

EJLC administers this $7 million in DFMS endowment funds as a loan portfolio. The funds in the portfolio are used on a revolving basis to provide loans, indirectly, to organizations, institutions and individuals that may not qualify in the regular credit markets but have worthy community economic justice development programs and projects. The principal, upon repayment to DFMS, is re-loaned by DFMS to others through the program administered by EJLC. All the loans pay interest, and that interest income is used to support DFMS's program budget.

EJLC loans generally range in size from $100,000 to $300,000 and may be as large as $500,000. EJLC makes no loan unless the appropriate diocesan bishop approves in advance.

The EJLC program does not lend directly to the end users of the funds but *only* to financial intermediaries such as community development loan funds or community development credit unions. These intermediaries, commonly called Community Development Financial Institutions (CDFIs), themselves re-lend the monies provided by DFMS to groups, organizations and individuals with needs to finance community economic justice development programs and projects. Many CDFIs operate in the United States, and many operate globally.

Spreading the EJLC loans among multiple intermediaries has several advantages for the Church. The CDFIs are in the business of providing community development loans and have professional staffs to support their end-user borrowers; CDFIs generally have the scale to handle large numbers of borrowers. The Church is not in that business and has no such staff or capacity. These intermediaries also typically provide financial training and technical and management assistance along with financial capital to their borrowers – all services that the Church is not equipped to provide. Finally, spreading EJLC's loans over a number of experienced CDFIs greatly reduces risk to DFMS's economic justice loan portfolio. Through years of carrying on their businesses, CDFIs develop track records that EJLC can evaluate. The CDFIs, not DFMS, directly bear the risk of losses on loans to the end-users of this capital, and the CDFIs generally are well positioned to take steps to intervene and prevent or reduce any such losses.

Here are examples of investments made by DFMS through the program overseen by EJLC:

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

The discussion below on the Committee on Corporate Social Responsibility (CCSR) reports that in 1997 Convention passed a resolution encouraging "corporations" to invest in South Africa, to help rebuild the economy after apartheid. As noted above, EJLC was formed in 1997. The first loan EJLC approved was a $500,000 TEC loan to support economic development in South Africa.

Engagement on Faith Issues with Companies in the DFMS Portfolio – the Committee on Corporate Social Responsibility

In May 1971 Presiding Bishop John E. Hines stood up at the General Motors annual meeting to present the first ever shareholder resolution by an investor of faith. On behalf of DFMS, Bishop Hines called on GM to stop doing business in South Africa. That was the opening move by investors in support of the wider effort to end apartheid. The year 2021 marks the 50th anniversary of that historic first step in the Church's public ministry for corporate responsibility.

The 1971 shareholder resolution was drafted for the Church by the Committee on Social Criteria for Investments, a committee of Executive Council appointed by Bishop Hines in 1970.

That committee is the direct ancestor of Executive Council's current Committee on Corporate Social Responsibility (CCSR).

CCSR and its predecessors have worked continuously since 1970 on behalf of the Church using the tools of shareholder advocacy with companies, including engagement through correspondence and meetings, voting proxies, and filing shareholder resolutions and supporting those filed by other ethical investors. In this advocacy CCSR asserts and applies the Church's ethical teachings as expressed in resolutions on social and environmental justice issues adopted by General Convention and Executive Council. From the beginning of this ministry down to today, CCSR has helped shape the advocacy it undertakes for the Church, but CCSR implements existing Church policy and does not make policy. The companies held in the portfolio have been chosen by investment managers in accordance with policies adopted by the Investment Committee or General Convention or Executive Council. CCSR has done its advocacy solely based on the securities from time to time held in the DFMS portfolio.

In 1973 the Episcopal Church, through CCSR, was a founding member of the Interfaith Center on Corporate Responsibility (ICCR). ICCR has become the premier interfaith investor advocacy group in North America – its members file around 300 shareholder resolutions each year. Since its founding, ICCR and its members have been at the center of engagement by investors on every social, environmental and governance (ESG) issue that investors have sought to address with the companies they own – from apartheid to equal employment opportunity, from civil and human rights to weapons (including military arms and guns sold to individuals), from tobacco to opioids, from access to health care to sex trafficking and labor trafficking, and from the UN Sustainable Development Goals to climate change.

The Church's public ministry for corporate responsibility was supported from 1970 to 2009 by volunteers, dedicated staff and outside expert consultants. However, during the time of the great recession, in 2009 CCSR's budget was entirely defunded. From that time until 2016, all CCSR's work was carried out solely by volunteers. The Church discontinued its ICCR membership but was able to carry on some work with ICCR through efforts of CCSR volunteers and access kindly provided by the Church Pension Group under its ICCR membership.

In 2016 the President of the House of Deputies noted a decline in CCSR's work and appointed seasoned members to help resuscitate the committee. Shortly thereafter the Presiding Bishop acted, with the help of the Treasurer, to find funding for DFMS to engage consulting help for CCSR. DFMS subsequently engaged the highly professional Mercy Investment Services, Inc., a ministry of the Sisters of Mercy of the Americas, a Roman Catholic congregation of women.

Mercy Investment Services provides shareholder advocacy services to help its several clients carry out plans the clients develop to implement their own policies.

At the 2018 General Convention, the legislative committee responsible for socially responsible investing, noting the importance of the Church's public ministry for corporate responsibility and acting on its own, proposed resolution A296, which Convention adopted. A296 directed Executive Council to maintain an independent membership in ICCR and to treat "expenses associated with this membership, as well as on-going socially responsible investment consulting fees, as investment management expenses, rather than program expenses." In 2018 the Church resumed its ICCR membership. ICCR noted and celebrated the Church's return.

Over the 50 years of the Church's public ministry for corporate responsibility, with respect to certain issues and companies engaged in certain businesses or activities, General Convention and Executive Council from time to time have adopted divestment as a policy for the Church and have directed DFMS to divest. The Church began its divesting with South Africa.

The Church worked from the 1970s to the 1980s advocating with companies, governments and other investors for action to end apartheid. In the 1980s international sanctions were imposed on the government in South Africa. In 1985 General Convention "mandated" that DFMS **"**divest all holdings in companies doing business in South Africa and Namibia." In the 1990s, with the end of apartheid and with a new constitution and government in South Africa, international sanctions were lifted. In 1997 General Convention passed a resolution that "the Church now advocates for the rebuilding of South Africa's and Namibia's economic infrastructure and further encourages … corporations to consider investing there in support of economic opportunity and in the context of social responsibility."

Following its experience applying divestment in the context of apartheid, General Convention and Executive Council have adopted divestment policies – or portfolio restrictions – with respect to ownership of shares in companies implicated in five other matters of concern. These are defense contracting, for-profit prisons, the manufacture and sale of tobacco products, fossil fuels, and supporting or benefiting from denial of human rights.

As Convention and Council have widened the scope of the Church's ethical policy statements, CCSR has extended its advocacy in support of those policies. Currently, CCSR advocates with companies on human rights, sex and labor trafficking, health concerns (including gun safety), diversity in corporate America and care of creation and climate change. Responding to a 2018 Convention action, in 2019 Council caused DFMS to invest in publicly traded companies in the gun and ammunition industry in order to try to induce the companies to enhance gun safety.

Note on Investing on behalf of other Episcopal Church entities

DFMS offers the opportunity for any entity related to the Episcopal Church, including any parish, diocese, school or other organization, to enter into a voluntary custodial arrangement with DFMS to invest "along-side" DFMS in the pool of investment assets managed by DFMS. This pooled investment arrangement or program (the Program) is available at no cost to an eligible entity, except for the entity's pro-rata share of the investment fees and costs otherwise charged to the pooled portfolio as a whole.

No amount is too small – DFMS has new accounts with $500 invested – or too large. The DFMS database system also can handle multiple accounts and sub-accounts for a single owner. Apart from having a recognized relationship to TEC and entering into an agreement to abide by the terms of the arrangement, the only requirement is that an entity wishing to participate in the Program be recognized as a tax-exempt charitable organization within the meaning of Section 501(c)(3) of the Internal Revenue Code.

The Program is intended to provide eligible TEC entities with the ability to place their assets in a pool with the investment assets to which DFMS holds title and to have DFMS manage the investment of all the pooled assets together. The arrangement is intended to provide participating entities with the advantages of professional investment management and economies of scale possible with investing in a pool of assets.

Eligible entities should understand that the DFMS pool is managed to achieve DFMS's stated investment objectives, which may not be the same as the entity's, and that neither DFMS or the Program can or will attempt to meet any particular participant's investment objectives.

In addition, eligible entities should understand that the pool is managed by DFMS in accordance with ethical investment policies adopted by General Convention or Executive Council for DFMS to follow, and not in accordance with any other ethical investment policies, whether adopted by an eligible entity or another. Further, the DFMS pool now includes no impact or community investing investments. The endowment assets invested by EJLC in community development loans are in a separate fund, not in the portfolio, and entities investing through the Program will not be investing in such fund of community development investments.

Entities interested in considering participation in the Program should contact the Director of Investment Management and Banking in the Finance Office of the Episcopal Church. Click here for The Finance Office | Episcopal Church (https://www.episcopalchurch.org/finance-office/)

Episcopal Church Context

Episcopal Church Foundation

The Episcopal Church Foundation (ECF) was founded in 1949 under the leadership of Presiding Bishop Henry Knox Sherrill to be an independent lay led organization for the support of the Episcopal Church and its work. Since 1969 ECF has been recognized by the Internal Revenue Service as a tax-exempt charitable organization as described in Section 501(c)(3) of the Internal Revenue Code. Over the years the focus of its programs has evolved, but ECF has retained its commitments to lay leadership and to serving the Church.

In 1995 ECF became the entity within the Episcopal Church to have primary responsibility for planned giving throughout the Church. At this time, ECF began a new commitment to stewardship and philanthropy, to raising financial resources for ministry, and to planning and leadership development for Episcopal churches, dioceses, schools and church-related organizations. In addition to providing resources and services to support parish planning and financial and investment management, ECF's programs include resources and services for stewardship, donor and capital campaigns tools and planned giving. ECF also provides endowment management for Church institutions through an arrangement with State Street Global Advisors (SSGA). In addition, ECF holds educational and training events, participates in events organized by others, and publishes resources in traditional formats and on-line.

As part of its mission to serve the Episcopal Church, ECF provides a comprehensive program of investment management services for Church investors. ECF advises institutional investors on all aspects of endowment management, including structure, operating policies and governance, and spending rules and donor restrictions. ECF will work with an institution to assist with any investment concern it may have, including helping it clarify its objectives, educate committee members or review possible portfolios. ECF also helps create or update investment and spending policies, with the goal of helping Church institutions use their long-term assets, as intended, for mission and ministry. And, for some years, as the field has grown, ECF has been advising institutional investors regarding adopting responsible investing and applying an environmental, social and governance (ESG) approach in managing their investment assets.

Recently ECF has brought its responsible investing and ESG experience, and that of the ecumenical community, to a wider audience. *Faithful Investing*, edited by James W. Murphy of the ECF staff and published in 2020 by Church Publishing, has given the Church a valuable resource in a widely accessible format. Through a collection of essays by investment experts and practitioners from across the ecumenical community, *Faithful Investing* clearly and concisely delivers information and insights that can help Church folk identify, and also answer, important questions about responsible investing and using ESG. Whether an institution has a developed understanding or has just begun to address the matter, these essays can provide balanced guidance for considering whether and how to undertake responsible investing, and, if the institution decides to do it, how to define and adopt a policy and then execute a program.

As noted above, ECF contracts with State Street Global Advisors, one of the largest institutional fund managers in the world, to offer Episcopal Church institutions of all sizes a variety of investment choices for their endowment and permanent funds. This collective investment program offers ECF clients broadly diversified investment options across asset classes, and at low cost. The minimum size for an ECF account managed by SSGA with socially responsible options is $100,000; without such options, the minimum is $10,000. The assets of Church institutions invested under SSGA management through ECF total about $460 million.

SSGA is a signatory of the UN Principles for Responsible Investment (PRI) and seeks to fulfill the commitment to responsible investment it has made. ECF and SSGA offer two approaches to responsible investing. Whether or not an investing organization wishes to have any positive or negative screens applied to a portfolio in which it invests, as a PRI signatory SSGA has a comprehensive program, called *Asset Stewardship*, for engagement with companies in all SSGA portfolios. Applying a number of tools, SSGA assesses the ESG performance of portfolio companies and engages with them as SSGA deems appropriate to encourage sound ESG practices. When appropriate, SSGA votes its proxies on ESG issues.

In addition, ECF and SSGA offer three options for Church institutions that wish to invest in portfolios that are specifically screened. ECF clients may choose from portfolios screened (i) more specifically for ESG issues (including entirely excluding tobacco and certain weapons, firearms and fossil fuel companies), (ii) to be fossil fuel reserve-free, or (iii) for certain social issues. ECF and SSGA will assist any Episcopal Church institutional investor considering such a screen to understand the principles followed in applying the screen and the effect of using it.

Church institutions concerned with responsible investing and ESG, and considering investing with ECF and SSGA, should understand that SSGA's *Asset Stewardship* program is based on an ESG scoring system, engagement priorities and proxy voting guidelines developed by SSGA's asset stewardship experts. The socially responsible portfolios are based on screens developed by SSGA or other asset managers. These guidelines and screens can be expected to address issues considered by General Convention or Executive Council, but they are not based on ethical policies or decisions adopted by Convention or Council. More information is available from ECF.

Church institutions interested in considering having ECF and SSGA manage their endowments should contact ECF at endowment@episcopalfoundation.org .

Anglican Communion Context

Church of England

National Investment Bodies

The Church of England (C of E or the Church) has three sets of “national” investment assets and three entities to hold and manage them. These are the *National Investment Bodies* or *NIBs*. The three NIBs together hold and invest a total of about $16.5 billion in assets for the Church.

Each NIB independently manages the assets it holds. To assure it acts in accord with a common understanding of how to apply the Church’s faith in investment management, each NIB undertakes to adopt and follow ethical policies *recommended* by the C of E’s *Ethical Investment Advisory Group* (*EIAG*). Each NIB has representation in the EIAG and participates in its work.

Here are brief descriptions of each of the NIBs:

- *The Church Commissioners for England (Commissioners)*

  The Commissioners hold and invest a total of about $11 billion in assets.

  Parliament created the Commissioners in 1948 by combining two long existing predecessors. The Commissioners hold and manage assets that originate centuries ago in the Church’s then very extensive real property holdings. (One predecessor, the *Bounty of Queen Anne for the Augmentation of the Poor Clergy*, was formed in 1703, just two years before Queen Anne gave Trinity Wall Street the 215 acres of land on Manhattan Island known as the King’s Farm.)

  Since 1948 the Commissioners have greatly diversified their holdings, and now, while they still own much real estate, the bulk of their holdings is in financial assets such as stocks and bonds.

  To support parish ministry, bishops, and cathedrals, the Church Commissioners distribute grants to the Church amounting to about $300 million annually, representing about 15% of the Church’s annual revenue. (Parishes provide about 75% of annual funding for the C of E.)

  As the full name of *Queen Anne’s Bounty* may suggest, the Commissioners and their predecessors historically have provided stipends and housing to active and retired C of E clergy. In 1997 Parliament approved a new pensions scheme to be supported, going forward, by contributions of parishes and other employers. The Commissioners remain responsible to pay clergy pensions that were earned through 1997 and also to provide clergy housing.

https://www.churchofengland.org/about/leadership-and-governance/church-commissioners

- *The CBF Church of England Funds (Funds)*

  The Funds hold and invest a total of about $2 billion in assets.

  The Funds were set up in 1958 to provide an integrated investment service for parishes, dioceses, cathedrals and other C of E bodies with their own investment assets. The Central Board of Finance (CBF) has been trustee of the Funds since inception. (The CBF membership is coextensive with that of the Archbishops' Council; the Council, headed by the two Archbishops, is the highest executive body in the C of E, intended to give the Church strategic direction.)

  https://www.churchofengland.org/sites/default/files/2018-10/gs1640-trusteeship%20of%20the%20cbf%20cofe%20funds.pdf

- *The Church of England Pensions Board (Board)*

  The Board holds and invests a total of about $3.7 billion in assets.

  The Board administers the pensions scheme created in 1997 and is responsible to pay pensions earned after that year, funded by parishes and employers, and to provide clergy housing.

  https://www.churchofengland.org/about/leadership-and-governance/church-england-pensions-board

Ethical Investment Advisory Group

In 2018 the NIBs approved a set of *Terms of Reference* to define their relationship to the EIAG:

> The EIAG is an Advisory Group convened and funded by [the NIBs]. …
>
> The EIAG's purpose is to support the NIBs to invest ethically in a way which is distinctly Christian. This shall be achieved by offering timely and practical Advice and support to the NIBs, who shall formulate policy. …
>
> Such Advice shall be grounded in Christian theology. …
>
> The EIAG shall have no investment powers and may act only in an Advisory capacity in accordance with its purposes as described above. Advice given by the EIAG shall not be

> binding on the NIBs, and the adoption of any Policies drafted as a result of the EIAG's Advice shall remain the responsibility of each NIB.
>
> https://www.churchofengland.org/sites/default/files/2019-02/EIAG%20Terms%20of%20Reference%20agreed%202018f.pdf

On recommendation of the EIAG, in 2018 the NIBs also adopted a *Statement of Ethical Investment Policy* (Ethical Policy) that further specifies the framework for ethical investing by the NIBs. The Ethical Policy describes the function of the EIAG as follows:

> The NIBs receive advice and support on ethical investment from the Church's Ethical Investment Advisory Group (EIAG). *The purpose of the EIAG is to enable the NIBs to act as distinctively Christian – and Anglican – institutional investors. [Emphasis supplied]* The EIAG develops ethical investment policy recommendations which, once agreed by the NIBs, are adopted by them, communicated to the wider Church and implemented.
>
> The EIAG consists of representatives of the NIBs, General Synod [analogous to General Convention], the Archbishops' Council and the Mission and Public Affairs Council [see note below], and certain co-opted members. Legal responsibility for all investment decisions rests solely with the NIBs.

Regarding the NIBs, the Ethical Policy states:

> The NIBs operate within the legal framework for investment by charities and pension funds. They owe certain fiduciary and other duties to their beneficiaries. Christian stewardship provides the context within which and informs the manner in which these duties are performed.
>
> The NIBs are signatories to the United Nations Principles for Responsible Investment (PRI) under which institutional investors pledge to incorporate environmental, social and governance (ESG) issues into investment analysis and decision-making processes, and to be active owners, across all asset classes.
>
> The NIBs recognize climate change as a distinct ethical investment issue and invest in line with a climate change policy. …
>
> The NIBs expect companies in which they invest to manifest sustainable environmental practice, fair treatment of customers and suppliers, responsible employment practices, conscientiousness with regard to human rights, sensitivity towards the communities in which they operate and best corporate governance practice. The NIBs engage with investee companies to seek improvement in ethical standards in these areas. …

> The NIBs do not wish directly to profit from, or provide capital to, activities that are materially inconsistent with Christian values, and are also mindful of the danger of undermining the credibility, effectiveness and unity of the Church's witness were they to do so. A range of investment exclusions is therefore maintained.
>
> The EIAG may, exceptionally, recommend exclusion from investment of any individual company in any line of business on ethical grounds - normally if, after sustained dialogue, the company does not respond positively to EIAG concerns about its practices. In such cases the NIBs will determine individually whether to disinvest if they hold securities issued by the company.
>
> https://www.churchofengland.org/sites/default/files/2019-01/Statement%20of%20Ethical%20Investment%20Policy%20-%20October%202018%5B1%5D.pdf

The EIAG has recommended, and the NIBs have adopted, several ethical investment policies in addition to the general Ethical Policy quoted above. The EIAG website describes these as follows: "The policies we recommend to the NIBs are the basis for a distinctly Christian approach to investment, embracing screening, active stewardship, and alignment with the Church's teaching and values. The NIBs' overall approach to ethical investment is described in their Statement of Ethical Investment Policy [*i.e.*, the Ethical Policy quoted above]."

After that description, the EIAG website lists and provides links to 20 separate ethical investment policies, ranging in subject matter from the *Alcohol Policy* to the *Climate Change Policy*, from the *Executive Remuneration Policy* to the *Extractive Industries Policy and Advice*, and from the *High Interest Lending Policy* to the *Supply Chain Engagement Framework*.

https://www.churchofengland.org/about/leadership-and-governance/ethical-investment-advisory-group/policies-and-reviews

Generally, the EIAG statements recommending such policies include discussion of matters of faith. For example, the EIAG Advisory Paper supporting the *Climate Change Policy* (which deals at some length with a major and contentious issue within the C of E) includes four pages of Biblical, theological and ecclesiological "reflections" -- in moderately small type.

https://www.churchofengland.org/sites/default/files/2017-11/Climate%20Change%20Policy%20.pdf

As mentioned above, the Mission and Public Affairs Council of the Church of England (M&PA Council) is represented on the EIAG. In submitting comments for a public inquiry into editing the human genome, the M&PA Council described itself as follow:

The Mission & Public Affairs Council of the Church of England is the body responsible for overseeing research and comment on social and political issues on behalf of the Church. The Council comprises a representative group of bishops, clergy and lay people with interest and expertise in the relevant areas, and reports to the General Synod through the Archbishops' Council. The Mission and Public Affairs Council presents a Christian ethos, drawing on the witness of the Christian Scriptures and reflecting on Christian tradition and contemporary thought. Belief in God as Creator and Redeemer, in human beings' intrinsic value as creatures made in the Image of God and in the imperatives of love and justice, underpins the Council's approach. The Council believes that the ethical and social principles developed from this foundation have a value and relevance in society that can be acknowledged by those of other faiths or none.

https://www.nuffieldbioethics.org/assets/pdfs/genome-editing-evidence-Mission-and-Public-Affairs-Council_Church-of-England.pdf

Afterword

Sustainable Development Goals

We are faced not with two separate crises, one environmental and the other social, but rather with one complex crisis which is both social and environmental. Strategies for a solution demand an integrated approach to combating poverty, restoring dignity to the excluded, and at the same time protecting nature.

Pope Francis*, Laudato Si', Encyclical Letter of the Holy Father Francis*

On Care for Our Common Home, ¶ 139 The Holy See, May 24, 2015

SDGs Adopted by the United Nations General Assembly, September 25, 2015

SDGs Endorsed by General Convention, Resolution 2018-B026, July 12, 2018

Goal 1. End poverty in all its forms everywhere

Goal 2. End hunger, achieve food security and improved nutrition and promote sustainable agriculture

Goal 3. Ensure healthy lives and promote well-being for all at all ages

Goal 4. Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

Goal 5. Achieve gender equality and empower all women and girls

Goal 6. Ensure availability and sustainable management of water and sanitation for all

Goal 7. Ensure access to affordable, reliable, sustainable and modern energy for all

Goal 8. Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

Goal 9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation

Goal 10. Reduce inequality within and among countries

Goal 11. Make cities and human settlements inclusive, safe, resilient and sustainable

Goal 12. Ensure sustainable consumption and production patterns

Goal 13. Take urgent action to combat climate change and its impacts*

Goal 14. Conserve and sustainably use the oceans, seas and marine resources for sustainable development

Goal 15.	Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
Goal 16.	Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
Goal 17.	Strengthen the means of implementation and revitalize the global partnership for sustainable development

* Acknowledging that the United Nations Framework Convention on Climate Change is the primary international, intergovernmental forum for negotiating the global response to climate change.

Acknowledgements

Many people have helped subcommittee #3 of the Task Force on Theology of Money carry out its work. None of them is responsible for what the subcommittee has written. The Task Force and subcommittee alone are responsible for this report.

The most important people to acknowledge are the leaders and staff members of the more than twice times fifteen institutional investors who allowed us to interview them and, often, review their institutional documents and talk to their professional advisers. Some were clergy. Most were lay people. Many were volunteers working to help their parishes or dioceses manage their investments faithfully. There are more than we can name. We are grateful for their help to us, their commitment to their institutions, and their support for faithful investing.

Three individuals and organizations deserve special mention.

The Rev. Canon Dr. Michael Barlowe and his staff in the Office of the General Convention provided support that made it possible for a member of the Task Force to attend the 2020 Annual Gathering of the CEEP Network (Consortium of Endowed Episcopal Parishes or CEEP).

Joseph Swimmer, Executive Director of CEEP, and his staff made us welcome and helped with meetings and interviews, as well as advice and communications before and after the Gathering.

JoAnn Hanson, President and CEO, Church Investment Group, provided introductions to investors across the Church as well as information, documents and wise counsel.

We thank the chairs of Executive Council’s Economic Justice Loan Committee, Investment Committee, and Committee on Corporate Social Responsibility, who welcomed our inquiries and shared their insights. We also thank the staff members of the Church Pension Fund, the Domestic and Foreign Missionary Society, the Episcopal Church Foundation and the Church of England Pensions Board who patiently gave us the benefit of their knowledge and experience.

Finally, the convener gives personal thanks to an old friend, Amy Domini, who, through her connections in responsible investing, enabled us to make contact with three institutions we might not have found. The stories of those faithful investors are vital parts of our report.

Committee Members

The members of Task Force subcommittee #3 are:

The Rev. Candice Frazer, Diocese of Alabama,

The Rt. Rev. Gayle Harris, Diocese of Massachusetts,

W.B. McKeown, Diocese of New York, convener, and

Douglas Walker, Diocese of Florida

TASK FORCE ON THEOLOGY OF SOCIAL JUSTICE ADVOCACY

Membership

Ms. Sarah Lawton, *Chair*	California, VIII	2021
The Rt. Rev. Prince Singh, *Vice-Chair*	Rochester, II	2021
The Rt. Rev. Andrew Dietsche	New York, II	2021
Ms. Ruth Frey	New York, II	2021
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2021
Prof. Brant Lee	Ohio, V	2021
The Rev. Deacon Guy Leemhuis	Los Angeles, VIII	2021
Ms. Lallie Lloyd	Massachusetts, I	2021
Dr. Dora Mbuwayesango	North Carolina, IV	2021
The Rev. Jose Rodriguez-Sanjuro	Central Florida, IV	2021
Dr. Reuben Varghese	Washington, III	2021
The Rev. Susanne Watson Epting	Iowa, VI	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

2018-A056 Create Task Force on the Theology of Social Justice Advocacy as Christian Justice

Resolved, the House of Deputies concurring, That the 79th General Convention direct the Presiding Bishop and the President of the House of Deputies of The Episcopal Church to appoint a Task Force on the Theology of Social Justice Advocacy as Christian Ministry, consisting of three (3) bishops, three (3) presbyters or deacons, to include both orders, and six (6) lay persons, who represent the diversity of the Church, to be tasked in this triennium to consider scripture, approved liturgical resources, other theological texts and previous actions of General Convention to summarize the ways in which The Episcopal Church understands the work for social justice as essential mission and ministry of the Christian Church; and be it further

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

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

Summary of Work

The Task Force met monthly via Zoom between January 2019 and January 2021. After reviewing its mandate and setting norms, the group agreed that each member would share what informs their theology of social justice advocacy. Told from our different and mutually enriching perspectives, these precious stories revealed equally different and enriching understandings of the theology of social justice. Through this journey of sacred stories, which included references to Scripture, theological concepts, and ongoing reflection on world events, it became clear to the Task Force that The Episcopal Church has much work to do in re-examining our theology of social justice advocacy.

The work is urgent.

The suffering produced by injustice is with us now and does not wait for us to perfect our concepts and amend our tenets. As we were in the process of sharing our stories, our deliberations were interrupted by a global pandemic that disrupted our lives in ways not seen for a century. The disease most heavily affected those already harmed by systemic inequality, the most vulnerable in our society. We were interrupted again when the world experienced the visceral impact of watching, on small screens and large, the death of George Floyd. People felt the call to action and the Church was called with them.

These tragedies, lives lost to disease and lives lost to violence, were produced or exacerbated by government policy and by public behavior. The state, by what it does and what it leaves undone, demonstrates the power of its influence on people's lives. The collective action of people, as they comply or refuse to comply with exhortations of public actors, demonstrate the power of citizens in a free society. There is no neutral position in this world. To be silent is to be complicit. The Church cannot avoid a choice. And the Church cannot avoid examining every aspect of its life, whether theology, liturgy or governance, in how it either perpetuates or eases the burdens of inequality. The work is urgent.

We see the work, in fact the call to social justice, as a continuum, manifesting in direct service, financial support, advocacy for systemic change and reforming our own structures. Each form is important as, collectively and organically, we seek to be the Body of Christ, and all of God's people are important in building, mending, and strengthening relationships and changing systems.

Context:

Our individual contexts (including, but not limited to, geography, socio-economic status, race, ethnicity, nationality, age, ability/disability, gender, sexual orientation) create the lenses of perception through which we see the world as Christian individuals and as Christian community.

Our shared Episcopal identity affects every aspect of the Task Force's work, and one of our primary concerns is to place our work in the context of who we are as The Episcopal Church: we are a primarily white church that has benefitted from systems created by white men of wealth and privilege. While our church includes multi-racial and multi-ethnic siblings from countries outside the United States, ninety percent of U.S. Episcopalians are white.(1) In addition, the Episcopal Church actively retains 18th century institutional structures of governance, hierarchical authority, and rules-based procedure built by and for a dominant culture of patriarchy, classism, white supremacy, imperialism, and colonization.

Some implications of this were eloquently described by The Rev. Gay Clark Jennings, President of the House of Deputies:(2)

> *Too often, we are too proud that eleven presidents have been Episcopalians, that presidents and members of Congress and Supreme Court justices worship at our churches, and that we bury them with pomp and circumstance when they die. We are proud that, in Episcopal pews across the country, you can find civic leaders and business tycoons and media superstars. We still like our access to power and wealth.*
>
> *Now, there are many places in the church where the great wealth to which we have access is being used for great good. And we are justifiably proud that our history also includes prophets like Absalom Jones, Pauli Murray, Thurgood Marshall, and the martyr Jonathan Daniels. But in recent years, our identity as the church of the establishment has sometimes hindered our collective willingness to speak the truth about racist, xenophobic, anti-democratic policies and actions and the brutal policing and enforcement actions and practices that undergird them. Like the Anglicans who worshipped at Cape Coast Castle, we have helped normalize oppression and racism and the people who enforce it, because we have been too comfortable with our relationship to temporal power.*

Other themes pertaining to white supremacy and the dominant culture emerged in our reflections, including:

- Western Christianity has evolved in a symbiotic relationship with the engines of capitalism, where a concern to manage and protect financial assets are often valued over care and protection of people and creation.
- Our socially constructed narrative is one of individualism.
- Various cultures see and hear the Gospel differently. For example, it is embraced by Dalits of India (and other people who are oppressed) as a liberating text. Is that so among people of greater privilege?
- We need to reckon with the Episcopal Church's past for having colluded, consistently and often subliminally, with the Empire. Such a reckoning calls us to humbly name and lament the ways we have sustained systems of privilege and superiority, misusing Scripture for tacit approval.
- We need to acknowledge and lament the Church's role, sometimes active and sometimes as bystander, in the construction and perpetuation of economic and social systems that coerced Native Americans, African Americans, Asian Americans, Latin Americans, and other groups into less than human and subaltern status.
- We have difficulty recognizing and critiquing systems of domination both inside the Church and in the world. We refer people to the secular government to handle many difficult issues and often—consciously or unconsciously—remain unaware of the impact our lack of attention has on the most vulnerable. This includes systems that are deeply embedded, providing uneven and unequal access to material building blocks for a dignified life, such as access to appropriate health care, a good education, and family-wage jobs, which cannot be resolved by charitable donations, however important those can be in meeting immediate needs. Although many of our congregations are involved in much-needed programs of service and charity, we do not as often look "upstream" to understand what is the source of the ongoing problems that our programs are trying to address.

Given these contexts, we cannot avoid the observation that the lens through which many look at social justice is distorted.

While this report is not specifically a study about race or racial disparity, one constant theme in our work has been the centrality of race and racial disparity in addressing social justice advocacy.

How do we acquire the lens of Christ as we look at social justice?

Acknowledgement of History:

We can start by looking to prophets and laborers in our own tradition who have come before us. From Absalom Jones, first African American priest of our church, who preached mighty sermons and who published and petitioned against slavery, to Edward Willis Rodman, theologian, teacher, and pastor who helped to found the Student Nonviolent Coordinating Committee and who led the Episcopal Urban Caucus to push the Episcopal Church to focus on the intertwining of poverty and racism. We are rightly proud of the historic contributions of laypersons in public service, notably Francis Perkins, Secretary of Labor and architect of the New Deal; and Thurgood Marshall, civil rights attorney and first African American Supreme Court justice, both faithful Episcopalians who cited their faith as the basis for their work for justice in the political sphere.

We acknowledge the labor of pastors, preachers, and deacons, who have shepherded communities through times of terrible trauma: first Native American priest Enmegahbowh and deacon David Pendleton Oakerhater during the violent U.S. westward expansion into Indigenous lands in the 19th Century. We remember lay missionary and railroad worker Ah Foo, who helped start the first Asian Episcopal Church, in Carson City, Nevada. We look to the first Asian American churches in San Francisco, Los Angeles, and Honolulu, who supported their communities through the traumas of the Chinese Exclusion Act and Roosevelt's Executive Order 9066 leading to the internment of Japanese Americans. In an Episcopal Cafe series on the Asian American Episcopal Church, Bishop Allen Shin, Suffragan of New York, reflected that

> *Many of the Asians stayed in the church, despite the challenges and racial discrimination that they experienced. In fact, similarly to African Americans, Christianity was actually their outlet. Church was their community center. Church was the center of their communal life. Church had an important role in bridging and bonding the community together.*[(3)]

The Blue Book report of the Committee on the State of the Church in 2018 describes a perception of the Church's officially sponsored "outreach to people of color in traditional missionary terms of ministry to those people: bringing the Gospel of Jesus Christ to these communities and building agencies and institutions to provide for health care, education and social welfare"[(4)]

We look to the local initiatives of congregations and dioceses that have been anchors for their communities in the midst of upheaval and change—to name just a few examples: Church of the Epiphany / La Iglesia de la Epifania in Los Angeles, which became a center for the Chicano Movement in the 1960s;[(5)]

The historic work of church members and organizations in advocating for racial justice, from the abolition movement through Reconstruction and then Jim Crow to the Civil Rights Movement and up to today remains an important touchstone for our work today, from the early work of the Conference of Church Workers Among the Colored People (CCWACP), founded in 1883, and its successor organization the Union of Black Clergy and Laity (1968), later called the Union of Black Episcopalians (UBE). Their work was supported by groups such as the Episcopal Society for Cultural and Racial Unity (ESCRU), founded in 1959. Some of this work was focused on participation in the wider movement events of the day, such as the various marches in Selma in 1965 and voting rights campaigns, and some of the work was focused internally on our own Church's segregated institutions, from congregations to hospitals to seminaries in both South and North.

At the time, the Church's engagement with the Civil Rights Movement was often portrayed as controversial, divisive, and partisan, just as we hear today about church participation in Black Lives Matter protests. Yet the considerations of the participants at the time were explicitly linked to their Christian faith, especially in the mystery of the incarnation of Jesus, and our baptism, communion, and resurrection in Christ. Or as church seminarian and Civil Rights martyr Jonathan Daniels wrote: "I began to know in my bones and sinews that I had been truly baptized into the Lord's death and resurrection...with them, the black men and white men, with all life, in him whose Name is above all names that the races and nations shout...we are indelibly and unspeakably one."[(6)]

The Episcopal Church has also had times of engagement and investment in economic justice, notably in funding invested in the General Convention Special Program and its Joint Urban Program from 1967 to 1983, and then in the Jubilee Ministry program begun in 1982 to start Jubilee Centers at diocesan and local levels and provide resources for training, networking, and action in a diverse set of urban and rural communities. The Jubilee resolution was undergirded by a theological and Biblical reflection offered by the Standing Commission on the Church in Metropolitan Areas in their 1982 Blue Book report:

> *We believe that in the Church's doctrine of the Incarnation we come face to face with our mission. Christ dwells among the least of our brothers and sisters; . . . . Certainly we are called to minister to the immediate suffering which afflicts the victims of society whom we see all around us; distribution of food, medical care, shelter, and other immediate and primary needs. But we also know that such ministries are not enough, because they do not address the injustice which causes the pain in the first place. The People of God share a mission to change whatever causes the oppression.*

From the 1970s into the 21st century, the advocacy work of a shifting group of organizations, including the National Industrial Mission, Episcopal Urban Caucus, the Union of Black Episcopalians, the Episcopal Network for Economic Justice, the Episcopal Peace Fellowship, Episcopal Women's Caucus, Episcopal Asiamerica Ministries, Integrity / Episcopal Rainbow, Claiming the Blessing, and TransEpiscopal, has been a key force in pushing the Church to engage in public advocacy. The newsletter "Issues" was begun in the living room of Episcopal theologian William Stringfellow to call the Church to its witness in the name of Christ; *Issues* is now the newsletter of The Consultation, a collaboration of social justice organizations in the Church.

In the push for women's ordination led by the a number of organizations and leaders including the Episcopal Women's Caucus and the Philadelphia Eleven, and then, the push for sacramental access for gay, lesbian, bisexual, transgender and queer people—we acknowledge here the vision of our late brother Louie Crew, founder of Integrity—the Episcopal Church also began to take positions on public policy related to lesbian and gay, and eventually, starting in 2009, transgender civil rights: relying on those resolutions, our church leaders have been in forefront among faith communities in advocating for LGBTQ civil rights; notably, our church's presiding officers were the lead signers on a 2019 amicus brief to the Supreme Court related to workplace discrimination against LGBT workers, *Bostock v. Clayton County, Georgia*;[(7)] as well, state representative Byron Rushing, also a senior deputy to General Convention, was a lead sponsor in 2011 of the Transgender Equal Rights Bill in Massachusetts.

In recent years, environmental and climate justice has been another major theme of church policy work. The work of Gwich'in Episcopalian communities in Alaska and of the Standing Rock Episcopal Mission in South Dakota have called the Church to respond to the effects of fossil fuels on humanity and the Earth. As well, the Church has focused on supporting immigrants and refugees, and has carried that work into advocacy on refugee and immigration policy. While the impetus for the work has come from immigrant congregations and solidarity work in affected communities, it has been taken up by the Episcopal Church's Office of Government Relations and the Episcopal Public Policy Network, with significant staff time allocated for this work.

With the emergence of a new uprising for racial justice in the wake of police killings of Black folk from Ferguson to Staten Island to Louisville to Minneapolis (let us say their names: Michael Brown, Eric Garner, Breonna Taylor, George Floyd) and the terrible murders at Emmanuel AME Church in Charleston, the Episcopal Church has begun to stir again. Led by Presiding Bishop Curry and with Becoming Beloved Community, the Sacred Ground curriculum, the Absalom Jones Center, and local resources, local congregations are engaging in new ways, though unevenly, with a new reckoning of our church's involvement in and complicity with racism. Some key recent General Convention resolutions include our repudiation of the Doctrine of Discovery in 2009 [2009-D035]; the call to examine our historic ties and financial benefit derived from slavery in 2006 [2006-A123], later extended in 2009; and the resolution calling for removal of the Confederate battle flag from churches, which was offered by the entire deputation of the Diocese of Mississippi in 2015 in response to the killings in Charleston [2015-D044].

A few major themes can be seen in this (brief and incomplete) survey: one is that the push for Episcopal Church involvement in social justice advocacy has always emerged from the communities most affected by injustice, and that those communities have understood our Christian faith and the love of Christ Jesus to be at the center of this advocacy. Indeed, while the Church-at-large has responded, the burden has often been on those communities to bring those issues to the attention of those who make policy, establish priorities, and allocate resources. We have wonderful examples and prophets, many of them now enshrined in Lesser Feasts and Fasts and its successor compilations. Yet our efforts have not always been sustained; we have started projects and then pulled back on funding and staffing them. Our triennial structure sometimes contributes to abrupt endings to work that is lifelong for both individuals and organizations.

It should be said that the Office of Government Relations and Episcopal Public Policy Network do admirable work in connecting General Convention resolutions to advocacy work for public policy in Washington, DC, and the Executive Council's Committee on Corporate Social Responsibility takes responsibility for making sure our Church's investment portfolio aligns with our stated values; but we are asking the Church not only to respond to the issues brought from under-represented groups, but to make those issues central to how we make decisions, including how we invest in formation and prayer for discipleship at the local level.

These historical themes were borne out in our second year of work, as we engaged our own contexts and as the world experienced major crises in 2020.

Emerging Themes:

Discord. Division. Brokenness. Need for reform. Resistance to reform. Frustration. Helplessness. Revelation. Possibility. Hope?

The themes that emerged from our stories and reflections, and their implicit theologies, were key in guiding the second year of the group’s work. These themes were identified before the COVID-19 pandemic was upon us and became even more evident after George Floyd was killed in May 2020. That they emerged, not only in the initial work of knitting us together relationally, but even more clearly through the crises around us, has compelled us to share them as a framework for our recommendations.

While the Task Force felt the familiar inclination to ensure terms were commonly understood and defined, we found that some themes emerged, again and again in our stories and reflections on the twin pandemics of COVID-19 and racism, and what those pandemics reveal about our failed systems and structures.

Some themes fit more or less neatly into one of the categories of "social," or "justice," or "advocacy," but eventually they all intersected. These themes provided a lens through which we re-examined the concepts of "social justice," and "advocacy." And the theme of "distortion" was consistent and undeniable.

Social Justice

The term "social" can refer to how society is organized, to companionship, or to an event at which people gather. It is about interaction with others and therefore always about relationships.

In the Christian vision, the term "justice" does not only pertain to the law, but has to do with what is morally right: equity, fairness, dignity, and right relationship.

Since the Episcopal Church has devoted time and resources to deepening and living into building out our understanding of The Rev. Dr. Martin Luther King, Jr.'s vision of "Becoming Beloved Community," his view of justice is particularly relevant. Dr. King wrote to white church leaders in 1963 in his Letter from the Birmingham City Jail that "injustice anywhere is a threat to justice everywhere." He taught that justice could not be parceled out to individuals or groups; it is the birthright of every human being.

If 'objectivity' is merely 'collective subjectivity'[8] then there is no such thing as 'objective' justice, only rules configured by, benefitting, and enforced by members of the dominant culture. Looking through the lens of Christ, the church is therefore called to resist the dominant culture and center 'justice' not definitionally on rules and enforcement, but experientially. The difference is between, on the one hand, experiencing fairness, protection, and restitution or, on the other, experiencing unfairness, bias, devastation, and—too often—death.

The call to justice, advocacy for justice, and persistent action for justice may be the most urgent call for the church, precisely because it existentially centers the voice, experience, and perspective of the vulnerable. Who among us can declare justice achieved except the oppressed and marginalized: the leper, the orphan, the widow; the Dalit, the BIPOC, the transgender person?

The church's mission is to restore all people to unity with God and each other in Christ [BCP, Catechism, p. 855]. Therefore, in the Christian vision, social justice is the lived reality of right relationship among and between each and all of us: something we long for in our hearts and strive for in our world because we see God in Christ in every person. This is explicit in our Baptismal Covenant: “Will you seek and serve Christ in all persons, loving your neighbor as yourself?” [BCP, Holy Baptism, p. 305].

This is the belief and covenant we assert, yet we tolerate and live with a profound distortion of this vision. A vivid example comes from one of our Task Force members, who wrote:

> *On this Pentecost, I saw this . . . at the end of a reflection: “If you would like to DO something to help dismantle systemic and institutional racism . . .” The reflection to that point was phenomenal for me as a brown person sitting in Episcopal pews over the years -- to finally hear words that recognize the oppression of people of color, suggesting that on the birthday of the church, transformation is what is being preached, called for. The plight of the oppressed was what was being centered. It gave me such hope.*
>
> *And then, to see it [presented] as a choice (‘IF you would like to do something...’) for Christians who recite our baptismal covenant; [to hear it preached] that our profession of faith has optional components, that once again reflects a privilege to choose, which affords white Christians the option that Christians of color do not have. Striving for justice and peace is a matter of breathing for Black and Brown siblings, as past and present U.S. history has shown.*(9)

Advocacy

Advocacy has been described as “a social change process affecting attitudes, social relationships and power relations, which strengthens civil society and opens up democratic spaces.”(10) It consists of coordination, strategic thinking, information, communication, outreach and mobilization. It can be as simple as speaking up for another.

There can be a political aspect to advocacy, but there isn’t always. In fact, from the Latin “*advocare*” means ‘to call out for support.’ Like social justice, advocacy is a continuum: working to change public policy for the public good(11), advocacy can change public opinion and, likewise, affecting public opinion may lead to policy change.

Besides being extremely broadly defined, advocacy is surrounded by several persistent myths and misconceptions. Some the most common misconceptions include:

- Advocacy is only for professional lobbyists: In truth, advocacy is a public activity; while lobbying requires “behind-the-scenes” activities.

- Advocacy is walking down the street with a bullhorn or rioting in a demonstration or protest rally: In truth, rallies are activism, which can be useful as part of a larger strategy, but not always effective as advocacy in terms of sustained effort to change policy. Riots are violence.
- Advocacy is the same as fundraising or donating to charity: In truth, advocacy is about initiating social change, which cannot happen only by raising money. Social change is often achieved with little or almost no funds. At the same time, redirecting public and private resources can be an effective component of advocacy.
- Advocacy consumes a lot of time: In truth, advocacy doesn't have to be complicated or time-consuming – a properly planned and organized campaign requires small actions from many people rather than big ones from a few.
- Advocacy is all about "politics" (in a negative connotation): In truth, while advocacy can be political (i.e., lobbying for a specific piece of legislation), it is more often social and intellectual: focused on elevating, amplifying, and highlighting the voices and faces of affected people as well as speaking out on behalf of those without a voice or whose voice is suppressed or ignored.

(Thanks and credit to Anush Begloian for the framework and concepts in this section)[(12)]

Political

In turn, the word "political" is often confused with "partisan." "Political" comes from the Greek ("*polis*," meaning "affairs of the cities"), and does not equate with partisan. Politics means the set of activities for governing an area. Our church engages in politics when we bring our ethics and moral views into public conversations and deliberations about how our cities, towns, nations, and institutions are governed. We engage in politics when we ask: Who benefits from things as they are? Who is left out? How are the marginalized and most vulnerable affected by the action we are considering or the inaction we are tolerating that perpetuates things as they are?

Social Justice advocacy is core to the church's mission

The Task Force asserts that social justice advocacy is distinct from partisanship (though it may include supporting candidates or causes endorsed by a political party). Social justice advocacy is rooted in our moral tradition and our experience of Christ's death with us to sin and our hope of a risen life with him. Social justice advocacy is giving a public witness—through word and deed—to our biblical imperative to demonstrate our love for our neighbors.

Therefore, social justice advocacy is a central, not a peripheral or optional, manifestation of Christian discipleship.

Survey:

In the Fall of 2020, the Task Force sent a survey to bishops, deputies and other leaders of the church to gather stories and perspectives to inform our work. The survey was made available in English, Spanish, and French and was distributed with the help of the Episcopal communications office and the President of the House of Deputies.

Demographics

The survey received responses from 113 people. Reflecting the current racial makeup of the Church, a majority of respondents identified as White (82%) with minorities identifying as Black/African American (5%), Asian/Pacific Islander (2%), Hispanic/Latino (1%), Native American (1%). Ten percent of respondents chose not, or preferred not, to identify with the categories given. Women made up 66% of respondents, men 29%, while 9% chose not, or preferred not, to identify with the categories given. In terms of age groups, 16% of respondents were under the age of 50, with the majority of respondents 50 or older (50's 18%; 60's 23%, 70's 32%, 80's 10%; 90's 1%). In terms of sexual orientation, the majority identified as heterosexual (69%), 16% as homosexual, 2% as bisexual and 13% chose not, or preferred not, to identify with the categories given.

Overview

While the survey results should not be understood as comprehensive, the results offer themes for further exploration and a wide variety of perspectives on the theology of social justice advocacy in the Episcopal Church.

Many respondents claimed that social justice advocacy is at the core of the Gospel. Over and over, respondents cited scripture, tradition, prayer and liturgy—especially the Baptismal Covenant—as the foundation.

> *Everything about the Episcopal church and its finding the dignity in all people has informed my sense of call to work toward social justice. In living into my baptism, I find that it happens in both small and large ways, often through unplanned experiences and people met by chance or the grace of God. Each of us is called to be part of the beloved community of Christ, and without social justice, that really holds little meaning. Working toward what the church teaches and toward what Jesus calls the beloved community, requires work and above all love. That is what social justice is all about -- love and love in action.*

Many respondents felt supported and encouraged in their discipleship and by the ministry of the church:

> *It is powerful beyond measure to exercise faith by praying with one's feet in the company of others who long for the Beloved Community to come on earth as it is in heaven. The trust that is built, the accountability that is fostered, the truth that is told, are immeasurably more real, necessary and sustaining, than what I have experienced [elsewhere].*

Church resources that encourage social justice advocacy were named as support from clergy and bishops, groups of mutual support, Episcopal Public Policy Network (EPPN), Becoming the Beloved Community, Sacred Ground, ChurchNext curriculum, Community Organizing Principles and training, Asset Based Community Development Training and Episcopal Church participation in community organizing groups such as Faith in Action.

People of the church who responded to the survey described work in a variety of areas including prison ministry, police reform, immigrant detention, housing/homelessness, the death penalty, food insecurity, and public education. Activities encompassed charity, pastoral care, education and advocacy. Many did their ministry through ecumenical or interfaith organizations, or through secular ones.

> *Through a regional interfaith organizing group, I've had opportunities to work side by side with people different from me on, for example, getting local schools to commit to teach fuller and truer histories of race in our nation and region; helping to get local policing to better align with community values: supporting immigrants, including by accompanying them to ICE and immigrant court appointments; and developing a volunteer driver program to help get neighbors without cars to health-related activities.*

When asked what or who shaped their understanding of the relationship between social justice advocacy and Christian vocation, mentors—including parents, teachers and clergy—were a frequent answer. Also cited were encounters with people from different countries or cultures. We believe one respondent captured the sentiments of many by responding "Jesus!" Some related that it was their lived experience of marginalization and injustice that formed their earliest thoughts on social justice and advocacy. Others mentioned formation programs such as Education for Ministry and other covenant groups played a part in shaping theologies of social justice advocacy. Participation in the Civil Rights and Black Lives Matter movements similarly helped make this connection.

Respondents found the theological basis for social justice advocacy in the theology of creation and the incarnation, *Imago Dei* and the command to love neighbor as self. One respondent wrote:

> *The entirety of our sacred texts are about one thing - God's love for us, and our responsibility to model that love with one another, including ourselves - to be good stewards of all of God's creation - the earth and all that dwells on it. You cannot claim to love God, and not be a voice for the voiceless.*

Challenges

When asked what people found the most challenging in social justice advocacy in the church and what the church could do better, some cited the church itself as a challenge. Wrote one, "convincing other Episcopalians that being a nice, gathered community of good liberal people is not enough." Another wrote, "I would have no church if I preached [social justice] from my pulpit. I often feel caught between a rock and a hard place… Bishop Curry and other bishops encourage making room for all people at the table. How do I make room for both voices?"

One respondent noted:

> *A good start would be providing training for rectors and key parish staff in the theological basis for social justice, and in teaching this to their congregations. Basic training also would be helpful in how to discern the needs of their communities and how to work with existing resources.*

Others reported the church actively discouraged discussion or activities related to social justice. And others expressed disappointment by ways in which the Church does not uphold its own calls for social justice in its institutional life or pointed to the ways our view is distorted by our primarily Western, white, colonial vision.

> *I would like us to do more and think about the consequences within our own parishes less. [At one church I attended] we couldn't do anything that might tick off someone. As a result, it seemed everyone but a small percentage were ticked off.*

And another, on the wider Church institutions:

> *The entire process of leadership formation and church governance needs ... evaluation. For example, General Convention promotes and perpetuates the existence of multiple institutionalized hurdles for people of color to participate in the processes of PB&F, creating and submitting resolutions, and to find room for their voice in every aspect of our governance. People of color are still thought of as being invited into white spaces - that needs to change in itself. It's our Church, too. If you really want to welcome us, let us in and let us change you.*

Critiques & Cautions

Before sending out the survey, the task force consulted with several leaders in the Church to gain their feedback and comments. These leaders noted that for some faith communities the only theology *is* social justice theology. We were cautioned that some respondents might be confused or put off by the survey because it addresses "social justice theology as an add-on." While not the intention of this survey, the task force is cognizant of this shortcoming and is aware that the survey is likely to contain or perpetuate unconscious biases of the majority of respondents (white, middle/upper-middle class, heterosexual) and that it may not capture the many theologies guiding communities of the church. We also acknowledge that the survey was long and time-consuming; we appreciate the richness of the responses from all who took the time to share their stories and reflections.

Next Steps

In this report, we have just begun to scratch the surface in mining the information in this survey. We recommend this survey be made available, including translations, to other communities, seminaries and research groups to further explore the rich experiences and perspectives captured in it. We believe it can provide important information for congregational life, formation and education as well as evangelism and mission strategy.

Beginning theological implications:

Within the Anglican tradition, our way of doing theology is not mainly driven by inherited doctrines from theological giants of the past. Instead, we pray our way into our theology through the paths of praxis or experience. Therefore, our methodology in doing theology is conducive to pursue social justice advocacy, and more, as long as we avoid colluding with the Empire. The words of John Keble, a country priest, "and help us, this and every day, to live more nearly as we pray" [The Hymnal 1982, #10] articulate simply our theological and ethical methodology as a people of common prayer.

One of the through lines in Scripture from Deuteronomy to Acts is the Jubilee Year, a call for our communal life to be rebalanced and shared so that all may partake in our common life. The church participates in God's mission by seeking to reconcile the world with each other, creation, and God.

Social justice is about right relationships among and between all of us, centering the voice and experience of the marginalized (as we read in Matthew 25), and these are the relationships that have been, and continue to be, harmed by the systemic, unjust distribution of wealth, opportunity, and privilege.

Therefore, advocating and working for social justice is a core expression of the church's mission. As we said above, social justice includes acts of mercy or charity. It also includes dismantling institutions, structures, and policies that cause harm and divide us from each other; and it includes repairing the breach by rebuilding systems of justice, fairness, and equity (Isaiah 58).

While this observation may sound here like a conclusion, it's actually just the beginning. It gets us to the beginning of our journey, not the end; it repeats what many of us have known and others have resisted knowing. In any event, it fails to point us toward possible ways to make meaningful progress. What we need to talk about, explore, discover and practice within the wider church is how we will go about dismantling structures that perpetuate unequal power.

We also need to recognize the chasm between the Task Force's understanding of our Christian call to social justice and the private pietism that turns inward, aligning one's inner life with one's perception of God's will, perhaps in expectation of reward, and on leaning away from worldly engagement and machinations, such as advocacy, as being inappropriate, lacking virtue, or even, perhaps, "un-Christian."

By contrast, the Task Force feels called to lean into the world, and into the despair that injustice produces, to call out for change. We invite the church to do the same.

We are not underlining a common, and false, duality between action and contemplation. On the contrary, prayer should lead us to get close to our neighbors' suffering, and our neighbors' suffering should lead us to prayer.

End Notes

(1) Pew Research Center's 2014 "Religious Landscape Study," http://pewrsr.ch/1KtFGxx , accessed October 13, 2020.

(2) President of the House of Deputies Gay Clark Jennings, "How long, white Episcopalians, how long?," Executive Council opening remarks, June 8, 2020. https://houseofdeputies.org/2020/06/08/how-long-white-episcopalians-how-long-executive-council-opening-remarks/ , accessed January 18, 2021.

(3) As quoted in "Asian Americans in the Episcopal Church, Part 1," by Kelly Wilson, Episcopal Cafe, March 21, 2019. https://www.episcopalcafe.com/asian-americans-in-the-episcopal-church-part-1/ , accessed January 14, 2021.

(4) "Episcopal Church in Puerto Rico implements long-term recovery strategy after Maria," by Lynnette Wilson, Episcopal News Service, September 25, 2018.

(5) Report of the House of Deputies Committee on the State of the Church to the 79th General Convention, p. 4. https://www.episcopalarchives.org/e-archives/gc_reports/reports/2018/bb_2018-R026.pdf , accessed January 14, 2021.

(6) Jonathan Daniels, 1939-1965. The Church Awakens: African Americans and the Struggle for Justice. https://episcopalarchives.org/church-awakens/exhibits/show/escru/jonathan-daniels , accessed January 14, 2021.

(7) Brief for amici curiae: The Presiding Bishop and President of the House of Deputies of the Episcopal Church; United Synagogue of Conservative Judaism; General Synod of the United Church of Christ; the Central Conference of American Rabbis; more than 700 individual faith leaders, et al. in support of employee litigants https://www.supremecourt.gov/DocketPDF/17/17-1618/107139/20190703161241692_38129 pdf Moff br pdfa.pdf Moff br pdfa.pdf, as reported in the TransEpiscopal Blog, 6/15/ 2020: http://www.transepiscopal.org/blog/in-the-struggle-together , accessed January 18, 2021.

(8) Molefi Kete Asante, attributed by Ama Mazama, according to Ibrim X. Kendi, How to Be an Antiracist, published by One World, 2019, p. 167.

(9) Reuben Varghese, MD, MPH, and Task Force member, “A Pentecost Lamentation,” response to homily preached on Pentecost, May 31, 2020, at St. John’s Episcopal Church, Georgetown, in the Diocese of Washington; reprinted on the House of Deputies website at https://houseofdeputies.org/2020/06/02/a-pentecost-lamentation/ , accessed January 18, 2021.

(10) Handbook from Save the Children Fund, as quoted in the Culture and Creativity Programme of the European Union. https://www.culturepartnership.eu/en/publishing/advocacy-course/what-is-advocacy , accessed January 4, 2021.

(11) Here, as elsewhere, we hold the very concept of ‘public good’ up to the light: who defines it? Who constitutes the ‘public’? Who decides what is ‘good’?

(12) Anush Begloian, International Expert on Advocacy and Communications of European Union-Eastern Partnership “Culture and Creativity” Programme in Ukraine, Belarus and Moldova, 2016-2017, video lecture, “What Is Advocacy and How Can It Help?,” https://www.culturepartnership.eu/en/publishing/advocacy-course/what-is-advocacy , accessed January 4, 2021.

Proposed resolutions

A078 Imagining a Church Grounded in Social Justice as Christian Ministry

Resolved, the House of_concurring, That the 80th General Convention affirm:

1) That social justice advocacy is a primary ministry of the Church; it is our corporate, public witness to the Mission of God "to restore all people to the unity of God and each other in Christ." [BCP Catechism, page 855];

2) That social justice is about right relationships among and between all of us, centering the voice and experience of the marginalized (as we read in Matthew 25), and these are the relationships that have been, and continue to be, harmed by the systemic, unjust distribution of wealth, opportunity, and privilege;

3) That social justice ministry includes acts of mercy or charity but also must include dismantling institutions, structures, and policies that cause harm and divide us from each other; and it includes repairing the breach by rebuilding systems of justice, fairness, and equity (Isaiah 58);

4) Over this past triennium, (2018-2021) the global pandemic, racial justice uprisings, and escalation of the climate crisis including extreme wildfires and storms, as well as the societal fissures and institutional failures that these events have revealed, demand we understand this to be a revolutionary moment of accountability, repentance and renewed commitments to the mission of God. We are called to account for our failures to live the words we preach and pray. We acknowledge that historical practices, policies, and structures of the institutional church have played a role in the persistence of the systemic inequality and call out for out for immediate, urgent and enduring redress;

And be it further

Resolved, That all dioceses and congregations be called upon to offer, as a normative practice at any major or public gathering, an acknowledgement of the Native/Indigenous ancestors and peoples who have lived upon and loved the land on which we now live and work, from ancient times up to the present day; as well as, based on local history and context, the people of African descent who toiled in slavery and whose coerced, unpaid labor built our churches and contributed to our financial assets, as called for in General Convention resolutions 2006-A123 and 2009-A143; and be it further

Resolved, That all dioceses and congregations be called upon to ground every planning or business meeting or convention with prayers inviting an examination of conscience regarding the specific impact of the decisions of such meetings upon those who are poor, dispossessed, disadvantaged, or marginalized, and to provide and model forms for such examination of conscience; and be it further

Resolved, That all dioceses be called upon to offer, at least once a year, a diocesan-wide event or program and liturgy to engage our congregations and members in listening to and understanding the history and current context of our diverse local communities, with attention to those who have historically been dispossessed or disadvantaged; and be it further

Resolved, That this General Convention direct the creation of a Task Force on Imagining a Church Grounded in Social Justice as Christian Ministry be formed as a diverse group to include 2 bishops, 2 priests, 2 deacons, and 10 laypersons, in order to a) consider what the church must look like if we put our vocation to love our neighbor and to be repairers of the breach at the center of our work; b) to reach out to local and diocesan groups that are doing social justice and racial reconciliation work focused on systemic change, in order to understand what resources and gifts we already have in this work and where the gaps are; c) to liaise with the Standing Commission on Liturgy and Music and the Standing Commission on Governance, Structure, Constitution and Canons, the Presiding Officers' Advisory Group on Beloved Community Implementation (if it is extended in the next triennium), and other relevant interim bodies on consideration of these questions and how to address the institutional barriers to change in the church; and d) be charged with making recommendations to the 81st General Convention for institutional change to support social justice as Christian ministry in the areas of governance and structure, prayer and liturgy, catechesis and lifelong formation for discipleship, especially with laypeople and consistent with an equitable and inclusive polity; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $55,000 for the implementation of this resolution.

EXPLANATION

The 2021 Blue Book report of the Task Force on Theology of Social Justice Advocacy to the 80th General Convention provides the background for this resolution; please read the report in full. As we say in the report, this resolution is not a conclusion, but only a beginning.

$55,000 is requested to fund this resolution:

> One in-person meeting ($27,200, estimated at $1,700 x 16 members) of the Task Force on Imagining a Church Grounded in Social Justice as Christian Ministry;
>
> Additional funds for task force members, in smaller teams, to carry out local site visits to congregations and dioceses doing exemplary work in training, formation, and implementation of social justice ministry; and to liaise with other interim bodies as described in the mandate ($27,800 total: estimated at $1,390 per meeting (assuming that the task force strive for efficiencies with local travel) x 2 members per team, x 10 meetings).

TASK FORCE ON WOMEN, TRUTH AND RECONCILIATION

Membership

Ms. Alexizendria Link, *Chair*	Western Massachusetts, I	2021
The Rt. Rev. Susan Goff, *Vice-Chair*	Virginia, III	2021
Mr. Neel Lane, *Secretary*	West Texas, VII	2021
Ms. Julia Ayala Harris	Oklahoma, VII	2021
The Rev. Laurie Brock	Lexington, IV	2021
Dr. Damaris De Jesus	Puerto Rico, IX	2021
The Rt. Rev. Ian Douglas	Connecticut, I	2021
The Very Rev. Dr. Kelly Brown Douglas	New York, II	2021
The Rt. Rev. Dr. DeDe Duncan-Probe	Central New York, II	2021
Ms. Robin Hammeal-Urban	Connecticut, I	2021
The Rt. Rev. Craig Loya	Minnesota, VI	2021
The Rt. Rev. Dr. Shannon MacVean-Brown	Vermont, I	2021
Mr. Alan Murray	Oregon, VIII	2021
The Rev. Kurt Wiesner	Utah, VIII	2021
The Rev. Deacon Carolyn Woodall	San Joaquin, VIII	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Mandate

2018-D016 Seeking Truth, Reconciliation and Restoration

Resolved, That the 79th General Convention as members of the Body of Christ, confess our sins of gender-based discrimination, harassment, and violence against women and girls in all their forms as we understand these sins, which include, but are not limited to, sexual and gender harassment, sexual assault, physically, spiritually, and emotionally abusive behavior, and oppression based on gender, particularly as these sins have denigrated and devalued women and their ministries; acknowledge that within our patriarchal culture, the misuse of power and authority is primarily exercised by men with the vast majority of victims being women; acknowledge that we have created a culture of excuses, justifications, enabling, and dishonesty around gender-based discrimination and violence; have not heard the experiences of women with the goal of justice through acts of contrition, restoration, and reconciliation; declare that we as the Church seek to turn from the systems of oppression, patriarchy, ableism, heteronormativity, white supremacy, and our colonial legacy, among others, and seek to engage in restoration of the dignity of women and reconciliation from past acts, beginning with confessing to God and to one another the truth that we have not loved God with our whole heart, and mind, and strength, and that we have not loved, respected, and honored the presence, gifts, equality, and ministry of women, seeing in them the presence of Christ; confess that we have embraced patriarchal power, and in doing so, have exploited women and been blind to injustice and prejudice; and declare that we seek to repent and be restored to God and to each other, with the Church and each diocese declaring a period of fasting and repentance for this sin; and be it further,

Resolved, That the 79th General Convention authorize the establishment of a Task Force for Women, Truth, and Reconciliation for the purpose of helping the Church engage in truth-telling, confession, and reconciliation regarding gender-based discrimination, harassment, and violence against women and girls in all their forms by those in power in the Church, making an accounting of things done and left undone in thought, word, and deed, intending amendment of life, and seeking counsel, direction, and absolution as we are restored in love, grace, and trust with each other through Christ; and be it further,

Resolved, That this Task Force be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with 15 members - 6 lay people (at least 4 of whom identify as women), 6 priests or deacons members (at least 4 of whom identify as women), and 3 bishops members (at least 2 of whom identify as women). The overall composition of this task force shall include members of the LGBTQ community, people of color, and reflect regional diversity. The overall composition of this task force shall include at least 5 members who have experienced gender-based discrimination, harassment, and violence against women and girls and at least 3 members who have personal and recent (within the last 5 years) experience working with complaints within the general Church and/or secular community on matters of gender-based discrimination, harassment, and violence against women and girls. This Task Force shall report its progress to Executive Council, present a public timeline, summary of ongoing work easily accessible by members of the Episcopal Church, and report back to the 80th General Convention on the following tasks:

-To develop a survey on gender-based discrimination, harassment, and violence against women and girls in all their forms as we understand these sins, which include, but are not limited to, sexual and gender harassment, sexual assault, physical, spiritual, and emotionally abusive behavior, and oppression based on gender. This survey shall be modeled on the survey used to gather information and compile the 2017 report "Sexual Misconduct in the United Methodist Church: US Update," and the task force shall create said survey no later than December of 2019 and shall work with appropriate general Church organizations, dioceses, and church leadership, both lay and clergy, to distribute widely in the Episcopal Church for access by both laity and clergy no later than spring of 2020, said survey being available primarily on-line, and with adaptations made as determined by the task force to enable responses by those members of the general Church who may not have ready and easy access to the internet;

-To conduct a review of survey responses and data regarding gender-based discrimination, harassment, and violent behavior that has been experienced by those who identify as women in our church; and present this information in accessible, public, and informative ways as a truthful reality of the treatment of women; and the impact of this treatment on lay and ordained women and girls, their ministries, and the ministry of the Church to the following members and organizations of the Protestant Episcopal Church in the United States of America: The House of Bishops, The Executive Council, The National Association of Episcopal Schools; all Episcopal Seminaries (including diocesan formation programs for ordination); Episcopal Camps and Conference Centers; Diocesan Youth Directors; all Canons to the Ordinary; all Transition Officers; all diocesan Chancellors; and any other bodies, organizations, or committees that the President of the House of Deputies or the Presiding Bishop deem necessary;

-To coordinate and receive reports from the aforementioned persons and organizations no later than six months after the publication of the survey response report with the following written responses to the report, a copy of the same responses shared with the Presiding Bishop and the President of the House of Deputies: How their body and/or institution has contributed to a church culture of gender-based discrimination, harassment, and violence against women and girls in all their forms, when appropriate detailing specific examples of this culture that has approved of this behavior, ignored and/or excused this behavior, and how this culture has damaged the body and/or institution; The body and/or institution's plan of action within their body or institution that can bring about a culture of truth telling, repentance, reconciliation, and justice in our church; including a timeline of said plan of action; and any other questions the task force, in consultation with the Presiding Bishop and the President of the House of Deputies, deem helpful and necessary for the general Church to confess the truth of the impact of the sin of gender-based discrimination, harassment, and violence against women and girls in all their forms and to engage the process of restoration and reconciliation;

-To create a Truth and Reconciliation process to guide churches, dioceses, provinces, and the general Church as they develop their own paths for reconciliation and restoration, with emphasis given to discerning the *qualities* of methods churches, dioceses, provinces, and the general Church may implement to witness the truth and to seek justice, restoration, and reconciliation; recognizing a one-size-fits-all process will not be helpful given the diversity of our Church, and that identifying qualities for a process invites churches, dioceses, provinces, and general Church to map their ways forward to justice, restoration, and reconciliation with guidance;

-To conduct a comprehensive audit and analysis of the internal church-wide structures that exist, or are needed, to educate and inform the church about realities and consequences of gender-based discrimination, harassment, and violence against women and girls in all their forms; to develop programs to proactively reduce incidences of gender-based discrimination, harassment, and violence within the church; as well as to develop resources that build the capacity of our church to provide trauma informed pastoral care for victims;

-To oversee an audit done by an outside auditor of the culture within church-wide structures to identify systemic expressions of power and leadership that create and continue gender-based discrimination, harassment, and violence against women and girls in all their forms, particularly the impact of this system as it manifests in access to leadership, pay inequity, imbalances in power, inequality in leadership, gender-based discrimination, sexual harassment and violence, and the enabling of gender-based violence by those in positions of power throughout the church that diminishes, excuses, and discounts discrimination, abuse, and harassment, contrary to the Gospel of Christ;

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of $320,000 for the implementation of this resolution which will provide funding for regular meetings, including bi-annual in-person meetings throughout the triennium ($150,000); costs associated with creating and distributing the survey and subsequent reports ($40,000) contract with external firm to conduct a culture audit ($65,000); website, communications, and staff support ($50,000); and expenses associated with in-person presentations of findings to strategic groups, including Executive Council, the House of Bishops, and other groups as determined by the Task Force, the Presiding Bishop and the President of the House of Deputies ($15,000).

Summary of Work

I. Meetings and Scope of Work

The Task Force gathered initially in-person for two days in November 2018 in Linthicum Heights, Maryland as part of a wider church-wide gathering of committees, commission, agencies and task forces. During the in-person meeting, the Task Force had a detailed discussion on the creation of the Task Force, including the concerns that led to Resolution 2018-D016 of the 79th General Convention. Following the Liturgy of Listening service developed by Bishop DeDe Duncan-Probe and members of the House of Bishops and offered to the members of the church, the reality of gender-based discrimination, harassment, and violence in our culture and in our church could no longer be ignored or excused as outlier behavior. The service featured stories from women and men who were victims of sexual misconduct perpetrated by someone in the church. However, simply revealing the reality of these gender-based sins of the church is not where we as Christians can rest. We are called to make a fearless and honest accounting of our sins, and then to do the work of reconciliation. This work includes taking responsibility for a long history of gender-based discrimination, harassment, and violence; reflecting on how gender-based discrimination, harassment, and violence has become so deeply entrenched in the culture of the church; and repairing the damage that has been done. A significant strand of conversation regarding repairing the damage led our group to consider what a just outcome would look like to those who have experienced inequality, harassment, and other forms of oppression based on gender (particularly those who identify as women).

We coordinated with the Office of General Convention to schedule future meetings. These meetings occurred on the following dates in 2019: January 18th and 31st, September 10th, November 19th, and December 19th. All 2020 meetings were held online via Zoom in January, March, April, October and December (January 18, March 6, April 2, April 22-23, October 1-3 and December 17). Members of the Task Force with particular insight and expertise in specific areas were in contact regularly, particularly during the creation and distribution of the survey. We also regularly used the General Convention Message Board / Extranet to update members of actions taken, additional insights gained, and other relevant information regarding the work assigned to us.

Given the enormous tasks mandated to this Task Force by The General Convention, and after an honest assessment of what could reasonably be accomplished well in the triennium, the Task Force further focused our work by creating 3 subcommittees - a subcommittee to prepare, distribute and review the survey; a subcommittee to examine, implement, and oversee a systemic audit of gender-based violence and discrimination; and a subcommittee to create a process for truth and reconciliation.

We realized much of the work of the subcommittees for the audit and the truth and reconciliation process would be dependent upon the results of the survey and the responses from various Church leaders and institutions regarding the survey results. All subcommittees, however, did move forward with their assigned areas.

The subcommittee for the audit worked to define the terms justice, truth, reconciliation, and abuse of power so that as a church, we can begin with a common language of key terms in order to enable common conversation. Further, the terms as defined by this subcommittee and the Task Force will be incorporated into the results of the survey when they are shared with the church. The survey subcommittee identified and worked with a consultant prior to and during the survey process to develop, distribute, and examine the results of the survey. More about this process is in the survey section of this report. The subcommittee for the process of truth and reconciliation began to explore various ways these processes have been used at institutional levels and the methods, practices, approaches, and resources that are available as we as a church move forward. We also discussed the various models of truth and reconciliation that have been used within The Episcopal Church, particularly by various dioceses, regarding gender discrimination, harassment, and violence.

The Task Force reviewed and discussed in detail the Report on Sexual Misconduct used in the United Methodist Church. After discussion of various options, the Task Force decided to conduct a similar survey, engaging the professional researcher who developed and compiled the results of the United Methodist Church survey. Among the areas of concern the Task Force highlighted were: ensuring the survey results were as anonymous as possible; asking questions that addressed the many ways gender-based discrimination, violence, and harassment are inflicted upon victims; and making sure the survey was available to as many people as possible who wanted to share their experiences, including those who may no longer be active members of The Episcopal Church because of their experience with gender-based discrimination, harassment, and abuse.

The Task Force recognized that the mandates of D-016 may also be appropriately addressed by other interim bodies during this triennium. Members agreed that those mandates that were more correctly suited to the mandates of other interim bodies would be referred to those bodies to avoid duplication of tasks and to use the time and creativity of all interim bodies efficiently. Our Task Force unanimously agreed that the scope of work would be to focus on creating, distributing, and reviewing the results from the comprehensive survey and developing guidelines for the survey results to be distributed to appropriate church bodies as we establish a process for a Systematic Review/Audit and Truth and Reconciliation Process.

The Task Force discussed their progress and concerns with the presiding officers in a virtual Task Force meeting in April 2020. Additionally, during the two-day April meeting, the Task Force met with other interim bodies including the Task Force to Study Sexism and Develop Anti-Sexism Training, and the Task Force on Theology and Social Justice Advocacy to share resources and determine which task force may be best suited for mandates from General Convention regarding 2018-D016. Members of the Task Force also met with the Reverend Lester V. Mackenzie who shared his experience, thoughts, and guidance in both national and local truth and reconciliation practices. Father Mackenzie brought his insights from when he lived in South Africa during apartheid and the healing process of truth and reconciliation after apartheid.

II. Survey

A. Creation of the Survey

In Resolution D016, the 79th General Convention of The Episcopal Church resolved to take concrete steps toward addressing "the sins of gender-based discrimination, harassment, and violence against women and girls in all forms." Part of the resolution mandated a study of the experiences from the past, so the church and its members had concrete evidence of the scope and impact of gender-based discrimination, harassment, and violence on those who are victims, those who are victimizers, and the church as a whole. As stated earlier in this report, the Task Force unanimously agreed that this survey was the important first step for the work of truth. We admitted we could not know how to address this insidious sin in our church without knowing the scope of it in our church.

In consultation with the Task Force, the survey was created by The Rev. Dr. Gail Murphy-Geiss, Ph.D. an ordained minister in The United Methodist Church and a Professor of Sociology at Colorado College in Colorado Springs, Colorado. Dr. Murphy-Geiss assisted the United Methodist Church when they sought to obtain insights regarding their church's experience with gender-based discrimination through a quantitative survey. Dr. Murphy-Geiss consulted with members of the Task Force as to the scope of the survey for The Episcopal Church. Dr. Murphy-Geiss created the survey using Qualtrics software. The survey was created; in both English and Spanish, and distributed electronically in the Winter of 2020 through The Episcopal Church Communications Department and Directors of Communication in various dioceses. The survey was offered in an electronic format and a printed format for those who may not have access to the internet. The initial time for the survey to remain open was extended to respond to the impact of Coronavirus. The survey remained open through the Spring and into the Summer of 2020.

Of note is that the Task Force expressed concern that asking people who recall and share, even anonymously, an event or events of harassment, discrimination, and violence may be traumatic for those who are completing the survey. The Task Force planned to offer lay and ordained Episcopal chaplains, contracted specifically for this purpose, as one resource. After lengthy conversations with leadership of The Episcopal Church and the Office of the General Convention, it was decided during the April 2020 meeting of the Task Force that this plan was not feasible if the survey was to be distributed by mid-2020.

Another factor as we developed the survey was the very real duty of clergy to report in accordance with Title IV (the clergy discipline canon) of the Constitution and Canons of the Episcopal Church. The mandate of 2018-D016 involves, by necessity, hearing the stories of victims of gender discrimination, abuse, harassment, and misconduct: all of which would require a mandatory reporting per Title IV. After repeated consultations with the Chancellors for the Presiding Bishop and the President of the House of Deputies, we were able to develop survey questions and a summation process of survey responses that alleviated most concerns from the Chancellors.

B. Survey Results

Results and data for our survey entitled *Gender-Based and Sexual Misconduct in The Episcopal Church* are detailed in a 29-page report with tables at the end of this report. The data categories included tables for 1) Demographics, 2) Knowledge and Awareness, 3) Experiences of Misconduct, 4) Responses to Misconduct, 5) Impact of Responses to Misconduct, 6) Impact of Misconduct on Lives, and 7) Witnessing Misconduct of Others. The last survey question allowed respondents to add anything else important to them including personal stories.

After an initial review of the report, members from the Task Force met with the consultant for an in-depth analysis and clarification of data results. This meeting was recorded and made available to members of the Task Force who could not attend the meeting, as the discussion was deemed vital to our next phase of work.

III. Processing Initial Information from the Survey

A. Consultation Regarding the Results of the Survey

The pandemic has created complexities in obtaining and reporting information, a reality not unexpected by our Task Force. However, one of the mandates of 2018-D016 is to share the information gathered in this survey with church leadership and agencies. To that end, the Task Force has made arrangements to present the survey report in April 2021 to the Mission Within the Church committee of the Executive Council for their reflection and responses.

Although General Convention is rescheduled to 2022 due to the effects of the Coronavirus pandemic, the Task Force plans to work diligently to present results of the survey to other interim bodies for their insight and work including the Task Force to Study Sexism and Develop Anti-Sexism Training, and the Task Force on Theology and Social Justice Advocacy.

We would like to see the results of the survey shared with all dioceses, schools, camps and conference centers, and other agencies and organizations affiliated with The Episcopal Church, including the House of Bishops. Given the final report was completed in December 2020, the planning to present survey results is continuing to unfold as we consult with various church leaders.

B. Immediate Areas of Focus

While gathering factual information regarding gender-based harassment, abuse, and violence is an important initial step as we face the history and legacy of this sin in the church, this information must lead to serious reflection about why this behavior has been permitted and even encouraged, its long-lasting damage to the body of the Church and its members, and steps that church leadership and its agencies can take to repair and restore the damage caused by gender-based harassment, abuse, and violence and ensure a new way forward in reconciliation.

Based on the survey results, the Task Force identified 3 main areas ripe for the work of repair, restoration, and reconciliation. They are 1) developing a useful, helpful, and safe process for reporting and investigating abuse, 2) developing more churchwide training that includes clergy and laity; and 3) updating materials to reflect a new-found awareness of gender-based violence, including working to develop common understandings of what constitutes gender-based harassment, discrimination, misconduct, and violence as well as to end the quiet toleration of said behaviors within the church, particularly among the cis male demographic.

1. Developing a useful, helpful, and safe process for reporting and investigating abuse

Current procedures for reporting and investigating gender-based harassment, misconduct, and abuse are limited to clergy misconduct guided by Title IV of the Constitution and Canons of the Episcopal Church. State and federal criminal and civil avenues may be available, as well. However, there has long been concern that the existing procedures do not allow any review or investigation of gender-based misconduct perpetrated by laity, as well as a long history of clergy misconduct being excused or ignored, while the victim is often the focus of retaliation. Clergy and employees particularly expressed fear that any report would be held against them, resulting in retaliation by the perpetrator, dismissal from the ordination process, removal from a church position, or being labeled as "problem clergy" by bishops and others in authority. The survey suggests that our current procedures are both lacking in protections, both short and long term, for victims and are still associated with practices of the past, where gender-based misconduct is ignored or excused or, in some cases, encouraged, while those victimized are discredited. Serious examination of the current misconduct process for clergy and laity for reporting gender-based harassment, misconduct, and violence is needed.

While procedures for reporting and investigating misconduct are needed, as important is the awareness that prevents a situation of gender-based harassment, misconduct, or abuse from happening in the first place. This awareness comes, in part, from training of both clergy and laity on what constitutes gender-based harassment, misconduct, and abuse, and the awareness of church policy and procedures regarding this area. In particular, the data found that most perpetrators are cisgender laymen. Therefore, the absences of guidance and awareness for the laity is important, and cisgender laymen should be of particular focus.

At the same time, support structures should be developed for the most common victims and survivors of this harassment, misconduct, and abuse - clergywomen and transgender/nonbinary clergy. Those who have been victimized need to be made aware of avenues or restitution and justice available to them.

2. Developing more church-wide training that includes clergy and laity

Although past training has received positive reviews overall, the awareness of what constitutes gender-based harassment, misconduct, and violence is changing. Comments that were seen as "cute" 25 years ago to the new young female priest regarding her appearance or her body are now recognized for what they are—gender-based misconduct. Training should pay particular attention to gender-based micro-aggressions, which are often subtle but are still damaging. One reality is that men and women, particularly of certain demographics, do not have a common language of what we mean by gender-based harassment, misconduct, and violence. Widespread training would begin to help with a common language and a church-wide understanding of behaviors that constitute harassment and violence.

Focus should also not only be on discrimination to cisgender women, but also to transgender and nonbinary persons, who are very likely to experience abuse in the church while having said misconduct ignored, excused, or encouraged.

A challenge with any training is to ensure that training and formation programs are widely attended. Mandatory attendance is certainly easier for clergy and lay employees. Our survey noted that most perpetrators are laypersons, work colleagues and fellow students, which makes required participation more challenging. One counter is that the training includes a section on tactics used to respond when a person witnesses an incident. This may help begin to create a culture where gender-based harassment, misconduct, and abuse is not only unacceptable in policy; it is also unacceptable from colleagues and fellow members of one's congregation.

Another focus is not only to limit the training to typical power differentials that bishops, rectors, supervisors, and professors are the typical offenders (although a focus on these power differentials is certainly needed), but also to explore the more common dynamics around the harassment of service providers and peers.

3. Updating materials to reflect a new-found awareness of gender-based violence

The demographic realities of The Episcopal Church present challenges for any substantial shift in culture around gender-based harassment, misconduct, and abuse. Most notable of these demographics is one of age and gender. The average member of The Episcopal Church is older than the average citizen of the United States. As social changes bring past norms and behaviors into new light, and groups who were previously admonished to stay silent speak out, those who benefited from and enjoyed the freedom to belittle and abuse women, to use female traits as insults, who have enjoyed the financial benefits of the wage disparity, and the many other ways gender-based sins have been legitimized by our culture, may be resistant to changes and new awareness. Certain groups may want to dismiss any attempts at restoring and repairing the damage, and they may sabotage our collective work to create a culture in the church that respects and values all genders, ensures safety, and protects the dignity of all genders.

C. Create a Truth and Reconciliation Process

Alongside the tasks that have been listed in the previous section, the Task Force takes seriously the process of telling the truth as necessary for reconciliation in our church. We continue this work by further examining survey results to understand more fully the scale and impact of past injustice within the church prior to starting the process. Foundational to the truth and reconciliation process are personal stories. The personal stories obtained through the survey that remain confidential may prove to be a valuable resource. We are also exploring a way for other personal stories to be told, as well as a path for those who have been perpetrators and enablers to hear the impact of their actions and/or inaction and offer their repentance. This truth and reconciliation process is just beginning with regard to gender-based violence.

IV. Actions to other bodies

The Task Force members agreed that the expansive mandate of Resolution 2018-D016 is beyond the capacity and budget of one Task Force to accomplish in time to report to the 80th General Convention. We have consulted with other interim bodies and standing commissions as we determine which ones may be best equipped to address particular sections of the Resolution. One area of particular concern was the mandate to "oversee an audit done by an outside auditor of the culture within church-wide structures" for the purposes described in the sixth point under the third resolve of Resolution 2018-D016.

The hope for such an audit is to discover those adaptive challenges that face the church regarding gender-based harassment, discrimination, misconduct, and abuse. A reality is that gender-based abuse and misconduct has worked for men in the church for centuries, and simply creating training modules and a more responsive misconduct procedure cannot unearth the long-entrenched beliefs, attitudes, and fears that lead to gender discrimination and abuse. These audits require the cooperation and collaboration of those in leadership positions, as well as the trust of all involved to respond to the information and insights uncovered by the audit. After thoughtful discernment and deliberation, the Task Force recommends the audit portion of 2018-D016 is better handled by the Executive Council and/or other bodies within the Church.

V. Enabling Continuing Work

The breadth and scope of the work mandated in Resolution 2018-D016 is substantial. Paired with the significant disruption caused by the coronavirus pandemic, the Task Force recognizes the mandates of 2018-D016 is more than can be accomplished within the current triennium. To meet all the mandates will require several triennia, if not decades, of work and effort to make significant inroads into creating new approaches and systems that value gender equality within the church. Gender parity in leadership opportunities, equality in wages, and attention to structures and cultures that value women are significant goals that will take time.

We have, however, begun the journey and are called by our faith in Jesus Christ to do this work and to strive for justice and dignity among all genders in the Episcopal Church, as well as be a witness to equality in our wider society.

Our Task Force requests that we be allowed to continue our work as a Task Force of the General Convention for the next 2 triennia, recognizing the continued challenges the current pandemic has created for the entire world. We ask that a budget of $157,000 be allocated to our work for the next triennium. This will allow for three in-person meetings over the next triennium, consulting fees as we develop training modules, and costs associated with the beginning work for truth and reconciliation.

We also note that we as a Task Force and as the wider church need time for further discussion and evaluation of the survey results. If granted an additional triennium for the Task Force to do its work, we plan to share the findings with to the following members and organizations The Episcopal Church: The House of Bishops; The Executive Council; The National Association of Episcopal Schools; all Episcopal Seminaries (including diocesan formation programs for ordination); Episcopal Camps and Conference Centers; all Canons to the Ordinary; all Transition Officers; and any other bodies, organizations, or committees that the President of the House of Deputies or the Presiding Bishop deem necessary. We would then continue our work, as stated in 2018-D016, of receiving responses from these organizations and members, reflecting on the information in the survey. These reflections include but are not limited to the following:

- How a specific church body and/or institution has contributed to a church culture of gender-based discrimination, harassment, and violence against women and girls in all their forms, when appropriate detailing specific examples of this culture that has approved of this behavior, ignored and/or excused this behavior, and how this culture has damaged the body and/or institution.
- The body and/or institution's plan of action that can bring about a culture of truth telling, repentance, reconciliation, and justice in our church; including a timeline of said plan of action.
- And any other questions the Task Force, in consultation with the Presiding Bishop and the President of the House of Deputies, deem helpful and necessary for the general Church to confess the truth of the impact of the sin of gender-based discrimination, harassment, and violence against women and girls in all their forms, and to engage the process of restoration and reconciliation.

Once this information has been received, the Task Force can begin to form the guidelines for the process of truth and reconciliation. The Task Force would seek, as stated in 2018-D016, not to create a one-size-fits-all process, but a process that would invite and guide churches, dioceses, provinces, and the general church to map their ways forward to justice, restoration, and reconciliation.

The Task Force will submit a Resolution at the upcoming General Convention reporting on the mandates met thus far and asking the General Convention to approve continuation of their work for the next two triennia.

Report on Gender-Based and Sexual Misconduct in The Episcopal Church for The Task Force for Women, Truth and Reconciliation

December 2020

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INTRODUCTION

In 2018, the 79th General Convention of The Episcopal Church approved a resolution to take concrete steps toward addressing "the sins of gender-based discrimination, harassment, and violence against women and girls in all forms." Part of that resolution mandated a study of the experiences from the past, as well as an audit of institutional structures currently in place and the identification of those needed to address the problem going forward. This document is a report of the survey results, with analysis and recommendations based on the data. Because gender-based and sexual misconduct are experienced by not only women and girls, but also men, transgender persons and nonbinary persons as well, this survey included questions for persons of all genders in The Episcopal Church. The survey's focus was on knowledge about the problem, opinions on Church-based training programs and processes for reporting, and perhaps most important, a reporting of personal experiences of misconduct, as well as attempts to support others who are victim/survivors. This study is intended to inform the longer process of seeking justice, reconciliation and restoration at all levels of the Church: local churches, dioceses, provinces and the full denomination.

METHODS

The survey (see Appendix A) was created by the Rev. Gail Murphy-Geiss, Ph.D., United Methodist clergywoman and Professor of Sociology at Colorado College, in consultation with a subcommittee of The Task Force for Women, Truth and Reconciliation. Modeled after a similar survey done in the United Methodist Church which focused on sexual misconduct, this survey was expanded to include questions related to gender-based misconduct as well, and the language was made more appropriate to the structures and culture of The Episcopal Church. The survey was created using Qualtrics software, in both English and Spanish, and distributed electronically in the Winter of 2020 through Directors of Communication in every diocese. It was left open through the Spring and into the early Summer of 2020.

Because the survey was not distributed to a random sample of Episcopalians, it is statistically impossible to generalize from these data to the entire Church. For example, just over 40% of survey respondents indicated that they had experienced some kind of gender-based or sexual misconduct in an Episcopal Church setting, but because victim/survivors are more likely to complete a survey on this topic, that percentage is surely higher than it would be if all Episcopalians had participated. Still, the numbers can be helpful in delineating the types of experiences people have had, as well some measures of knowledge and opinion, especially as compared across demographic groups. Again, an example: it was expected that clergy would have better knowledge about reporting procedures than laity – that is confirmed here. In sum, readers should use these numbers with caution, knowing that they might not represent everyone in the denomination, but because the sample is very large, these respondents surely represent **many** in the Church.

DEMOGRAPHICS

There were 2415 usable responses, defined as those who filled out more than just a few demographic items, such that analysis of their experiences and opinions was possible. Tables 1a through 1c list the pertinent demographics examined, along with the number (N) and percent of respondents in each category. Table 1a specifically delineates the demographic breakdown of respondents by age, gender identity, sexual orientation and race/ethnicity.

Table 1a: Age, Gender, Sexual Orientation and Race/Ethnicity of All Respondents

Variables	N	%
Age by Decade		
Teens and 20s	77	3.3
30s	205	8.7
40s	253	10.7
50s	452	19.1
60s	731	30.9
70s	538	22.8
80 and up	106	4.5
TOTAL	2362	100.0
Gender Identity		
Cisgender Female	1608	67.3
Cisgender Male	740	31.0
Non-Binary	26	1.1
Transgender Male	8	0.3
Transgender Female	7	0.3
TOTAL	2389	100.0
Sexual Orientation		
Heterosexual	1822	76.4
Gay	209	8.8
Bisexual	135	5.7
Lesbian	105	4.4
Asexual	76	3.2
All Others	38	1.6
TOTAL	2385	100.0

Variables	N	%
Race/Ethnicity		
White	2235	93.3
Black	46	1.9
Hispanic/Latinx	42	1.8
Asian/Pacific Islander	35	1.5
Native American	30	1.3
Others	7	0.3
TOTAL	2395	100.0

Note that the large majority (58.2%) of participants were 60 or older, and in fact, almost half of that group were 70 or older. While the average American is 37 years old, the average Episcopalian is 57, so this sample is likely to be fairly representative of the members by age (Smith, 2019). Similarly, respondents are overwhelmingly white (93.3%) which is also close to the denominational figure of 87% (Smith, 2019). The 1.3% figure for Native Americans is likely high, as based on their responses to other questions, a few respondents clearly read the question in terms of their birth/citizenship as Americans, rather than as their race.

Surveys on sexual misconduct always attract more cisgender women than cisgender men, and a good number of nonbinary and transgender persons, often because they are more likely to have had experiences as victim/survivors. The same is true regarding sexual orientation: lesbian, gay and bisexual (LGB) people experience sexual violence at equal or higher rates than heterosexuals, while the rates of violence reported by transgender persons is even higher, up to 47% in some studies (Human Rights Campaign, 2015). So, while these numbers may not indicate the prevalence of misconduct in the denomination, they point to the persons who care most about the issue, and many who are likely to be the focus of reconciliation efforts.

Table 1b shows a second set of demographics: income, education level, and role in the Church. These respondents included more middle-income people (46.1%) than the denomination overall (34.0%) (Masci, 2014), and about 19% fewer from each of the other categories, both younger and older groups. Education levels map heavily onto clergy/lay status, as the large majority of clergy have completed graduate school, while graduate education is much rarer for the laity. Role in the church was reported in the survey in many more detailed subcategories, particularly for clergy (bishops, rectors, priests, deacons, etc.) but many and small groups are not viable for statistical analysis, so subgroups were combined as appropriate to each area examined. Also, because respondents reported incidents in the Church primarily, but also in schools (including seminary) and in workplaces (including Church-related offices), the latter two may also include a few incidents outside of The Episcopal Church entirely.

Table 1b: Income, Education Level and Church Role of All Respondents

Variables	N	%
Income Group		
$0-$25,000	188	8.0
$25,001-$50,000	406	17.3
$50,001-$75,000	537	22.9
$75,001-$100,000	545	23.2
$100,001-$150,000	427	18.2
$150,001 and up	245	10.4
TOTAL	2348	100.0
Education Level		
Some HS, HS, GED	75	3.2
Associate's or Professional Certificate	170	7.1
Bachelor's	507	21.1
Graduate Degree	1646	68.6
TOTAL	2398	100.0
Church Role		
Clergy	924	39.3
Preparing for Ordination	47	2.0
Employees	306	13.0
Laity	1075	45.7
TOTAL	2352	100.0

A last demographic table (Table 1c) shows the Provinces from which respondents came, and the size of the churches they serve/attend. Response rates varied across the Church, probably based on the effectiveness of the dissemination efforts of those in charge of Communications in each diocese. The overwhelming majority of respondents were from the United States (only 9 came from outside the US), including participants from every state except New Mexico. As a result, these data should be seen as an assessment of the American Church only, since the experiences of Episcopalians outside of the United States are likely to be quite different. Regarding church size, 5% noted that they do not attend an Episcopal Church at all. That could be because they are responding as employees who work for the Church but who do not attend, or they have left the church and found the survey online.

Table 1c: Province (participants' states/regions/nations noted) and Church Size of All Respondents

Variables	N	%
Province		
I (CT, ME, MA, NH, RI, VT)	335	14.1
II (Europe, NJ, NY, VI's)	204	8.6
III (DE, MD, PA, VA, DC, WV)	294	12.4
IV (AL, GA, FL, KY, E. LA, MS, NC, SC, TN)	361	15.2
V (IL, IN, MI, E. MO, OH WI)	287	12.1
VI (CO, IA, MN, MT, NE, ND, SD, WY)	101	4.3
VII (AR, KS, W. LA, W. MO, TX, OK)	166	7.0
VIII (AK, AZ, CA, HI, ID, NV, OR, UT, WA)	592	25.0
IX (Dominican Republic, PR)	5	0.2
Don't Know/DNA	29	1.2
TOTAL	2374	100.0
Church Size		
1-49	466	19.8
50-149	1076	45.8
150-349	530	22.6
350	158	6.7
Do Not Attend	118	5.0
TOTAL	2348	100.0

KNOWLEDGE AND AWARENESS

The first set of substantive questions addressed awareness of policies, knowledge of incident reporting processes, and any training respondents had attended. Because awareness/knowledge/training often differs between clergy/professionals (for whom it is required) and laity, Table 2 depicts responses in terms of role in the Church by percent (number). As would be expected, for each measure, level of knowledge is statistically significantly higher for clergy, candidates for ordination and employees (combined for x2 analysis) than for laity ($p < .0001$). Just under half of the laity have attended a training, and fewer know about Church policies or where to report an incident. For the clergy, those with the highest awareness/knowledge/training, there are still many who are not adequately informed; for example, a full 20% say they would not know where to report an incident.

Those who indicated they knew where to report were invited to identify that resource in a text entry box. About two thirds (63.5%) named the Bishop and/or the Intake Officer. Another 6.8% named the Canon to the Ordinary, who was often identified as the Intake Officer. A small number (14.2%) said they would tell a priest and even fewer referenced the Warden or Vestry (1.4%) or the Police (1.8%). Clearly, the nature of the incident and the persons involved would lead people down different reporting paths. A notable minority (9.0%) recognized that complexity and said "it would depend" and named the persons to whom they would go in specific situations.

Respondents were also asked if they knew of an "agency" in the Church that provides support to victims. Only 9.2% (205) said they did. Those respondents were then asked to name that agency, and 125 people did so. Over half (52%; n = 65) of those respondents named something related to their diocese. The next most common response was a counseling services provider (14.4%; n = 18), followed by a local agency (12.0%; n = 15), most commonly a domestic violence shelter.

For those who attended an educational or training event (n = 1476), the large majority found it to be somewhat (44.8%) or very (43.7%) helpful. For those who identified the training more specifically, the most commonly reported was Safeguarding God's Children/People (37.2%; n = 515), followed by Safe Church (24.3%; n = 335). Smaller numbers identified various unnamed trainings as simply "online" or "in-person" or "in the Diocese."

Table 2: Percent (n)s of Respondents Who Are Aware of Policies, Know Where to Report, and Participated in Education/Training by Role in the Church

Variables			
Awareness of Policies	Know Them Well	Know They Exist	No/Not Sure
Clergy (910)	77.0 (701)	21.5 (196)	1.4 (13)
Candidates for Ordination (44)	50.0 (22)	45.5 (20)	4.5 (2)
Employees (303)	59.7 (181)	35.0 (106)	5.3 (16)
Laity (1053)	34.4 (361)	54.6 (575)	11.1 (117)
Know Where to Report	Yes	No/Not Sure	
Clergy (909)	79.9 (726)	20.1 (183)	
Candidates (44)	59.1 (26)	40.9 (18)	
Employees (303)	59.4 (180)	40.6 (123)	
Laity (1053)	43.8 (461)	56.2 (592)	
Attended Training	Yes	No	
Clergy (885)	84.6 (749)	15.4 (136)	
Candidates (42)	71.4 (30)	28.6 (12)	
Employees (296)	70.6 (209)	29.4 (87)	
Laity (1016)	48.0 (488)	52.0 (528)	

Respondents were also asked an open-ended question as to what would have made the training they attended better. The largest single group (15.8%; n = 78) said the information was outdated while another 10.3% (51) said it was repetitive of previous programs or trainings already done, often at work or in school. Quite a few respondents (17.2%; n = 85) named various topics that should be included or covered more fully, the most common being 1. boundaries, 2. power dynamics, 3. definitions and rules, and 4. reporting processes and enforcement. A few (9.3%; n = 46) hoped to see more case studies and get handouts while others (8.1%; n = 40) would like to have more interaction and group activities. A notable minority (6.7%; n = 33) noted the poor quality of the facilitator.

EXPERIENCES OF MISCONDUCT

Table 3 lists the percentages (numbers) of respondents who reported having experienced any misconduct at all, as well as those who experienced misconduct in an Episcopal Church setting, broken down into multiple subcategories. Variable categories are listed by number of respondents, highest to lowest. Cramer's V scores for strength of association are noted where statistically significant. Note that in some cases, variable categories had to be combined for the analysis. Where there is no association, not significant (n.s.) appears.

Table 3: Percent (n)s of Respondents Who Experienced Misconduct at All/In an Episcopal Church Setting by Demographic

Variables	At All	In Church Setting
Gender Identity		
Cisgender Female (1608)	90.2 (1451)	45.7 (735)
Cisgender Male (740)	85.4 (632)	31.9 (236)
Non-Binary (26)	84.6 (22)	61.5 (16)
Transgender Male (11)	87.5 (7)	50.0 (4)
Transgender Female (7)	71.4 (5)	71.4 (5)
V/p for FC v MC v NB/MT/FT	.071/0.0008	.151/<.0001
Sexual Orientation		
Heterosexual (1822)	88.4 (1610)	39.5 (720)
Gay (224)	87.9 (197)	44.6 (100)
Lesbian (111)	90.1 (100)	58.6 (65)
Bisexual (143)	91.6 (131)	55.9 (80)
Queer (17)	100.0 (17)	94.1 (16)
V/p for H v GLBQ	n.s.	.101/<.0001
Race		
White (2287)	88.9 (2033)	41.8 (957)
Black (47)	87.2 (41)	42.6 (20)
Hispanic/Latinx (45)	86.7 (39)	51.1 (23)
Asian (34)	79.4 (27)	32.4 (11)
Native American (32)	87.5 (28)	46.9 (15)
V/p for W v. People of Color (POC)	n.s.	n.s.
Age Group		
60 (1373)	57.7 (792)	34.7 (476)
40-59 (705)	88.5 (624)	50.1 (353)
18-39 (282)	86.2 (243)	56.0 (158)
V/p	.210/<.0001	.175/<.0001
Role in the Church		
Laity (1075)	88.5 (951)	24.6 (264)
Clergy (924)	89.7 (829)	61.5 (568)
Employees (306)	89.2 (273)	44.4 (136)
Candidates (47)	87.2 (41)	57.4 (27)
V/p	n.s.	.347/.000

Note that there is no difference by race in either category, and regarding sexual orientation and role in the Church, differences only exist for experience of misconduct in Church settings. Where there are differences, cisgender women are most likely to have experienced any misconduct at all, but transgender/nonbinary persons are most likely to have experienced it in a Church setting. Older persons are less likely than the other two age groups to have experienced misconduct in either condition, but it is hard to know whether such reports indicate fewer experiences or less awareness in earlier eras. Clergy and candidates for ordination are far more likely to experience misconduct in the Church than lay persons, with employees falling in between.

Another analysis of interest is the different rates of misconduct experienced at the intersection of gender and role in a Church setting, particularly out of concern for cisgender clergywomen, transgender and nonbinary clergy. Table 4 shows the percentages (numbers) for those subgroups, with statistically significant strength of associations noted as Cramer's V scores/p values. Cisgender clergywomen and transgender/nonbinary clergy have similar and very high reporting rates, as compared to cisgender clergymen, with a fairly high V-score of .324 indicating a strong correlation between gender and having experienced misconduct. Likewise, transgender/nonbinary laity have higher rates than cisgender laywomen, who have somewhat higher rates than laymen. Still, most of these cisgender laity have not experienced misconduct, while half of the 14 trans/nonbinary lay respondents have. For employees, cisgender men are the most likely to report misconduct, but not statistically different than cisgender women. The difference for employees is only notable when compared to trans/nonbinary respondents. Though only five people, 100% of these trans/nonbinary employees reported misconduct of some kind.

Table 4: Percent (n)s Who Experienced Misconduct in a Church Setting by Gender and Role in the Church

Role and Gender Identity	Yes	No	V/p
Cis Clergywomen (595)	73.1 (435)	26.9 (160)	
Cis Clergymen (308)	39.6 (122)	60.4 (186)	
Trans/Non-Binary Clergy (7)	71.4 (5)	28.6 (2)	.324/.000
Cis Female Employees (195)	42.6 (83)	57.4 (112)	
Cis Male Employees (106)	45.3 (48)	54.7 (58)	
Trans/Non-Binary Employees (5)	100.0 (5)	0	.148/.036
Cis Laywomen (753)	25.9 (195)	74.1 (558)	
Cis Laymen (301)	19.9 (60)	80.1 (214)	
Trans/Non-Binary Laity (14)	50.0 (7)	50.0 (7)	.092/.011

Specific behaviors were provided and respondents indicated if and where they had experienced such behaviors – in a local church, at school or in a workplace. Table 5a lists those percentages (numbers), listed in order from the most to the least commonly experienced in a Church setting. Percentages are taken from all 2415 respondents; note that they were invited to check all that apply, both for behavior and location.

Table 5a: Percent (n)s of Those Reporting Specific Behaviors by Location (N = 2415)

Behaviors	Church	School	Workplace
Comments/Teasing/Jokes	31.8 (767)	9.9 (238)	18.2 (439)
Touching/Closeness	23.9 (577)	4.4 (107)	8.5 (205)
Looks/Leers	22.3 (539)	6.0 (144)	10.1 (243)
Pressure to Engage in Comments	16.5 (399)	5.9 (143)	10.5 (253)
Attempt to Fondle/Kiss	11.1 (268)	2.6 (62)	4.3 (104)
Pressure to Date/Sexual Activities	7.8 (189)	3.1 (76)	4.1 (100)
Emails/Texts/Letters	6.3 (152)	1.6 (39)	4.0 (96)
Attempted Assault/Rape	2.9 (71)	1.6 (38)	1.4 (34)
Offer to Influence for Sexual Favors	2.1 (51)	0.6 (15)	1.9 (47)
Completed Assault/Rape	1.9 (47)	0.9 (22)	0.7 (17)

Note that comments/teasing/jokes are the most commonly experienced types of misconduct in all three settings, but #2 in a Church setting is touching/closeness, as compared to in school or the workplace, where it is #4. Because touching, through the ritual of the passing of the peace or more casual greeting/hugging is common in many churches, these behaviors can become problematic more easily than in professional settings. One clergywoman wrote, “One man made passing the peace an assault routinely.” Sometimes, the misconduct is intentionally inappropriate, but often, although offered innocently, it is received with discomfort. One respondent wrote, “The church, by its very nature, fosters emotionally intimate relationships. As a cisgendered white heterosexual man, I naturally assume the best about a situation, others might potentially find problematic, so I just need to be aware.”

Another way to look at these behaviors is based on demographic group. Table 5b shows the percentages of each statistically significantly association of behavior by gender identity, with statistically significant scores indicated. The statistically significant differences are seen only in the most commonly experienced/least egregious behaviors. For behaviors not listed, there was no difference by gender.

Table 5b: Percentages of Those Reporting Specific Behaviors by Gender Identity

Behaviors	Cis Female (1608)	Cis Male (740)	Trans/N-B (41)	V
Comments/Teasing/Jokes	36.8	19.9	56.1	.181***
Touching/Closeness	27.2	16.4	39.0	.126***
Looks/Leers	26.4	13.5	34.1	.146***
Pressure to Engage in Comments	18.5	11.9	31.7	.097***
Attempt to Fondle/Kiss	12.9	7.4	14.6	.077***

Table 5c shows the same behaviors regarding sexual orientation. Again, only statistically significant associations are included, but in this case, all behaviors show differences by sexual orientation except for "completed sexual assault," and all are more commonly reported by LGBQ persons than others.

Table 5c: Percentages of Those Reporting Specific Behaviors by Sexual Orientation

Behaviors	Heterosexual (1822)	LGBQ (475)	V
Comments/Teasing/Jokes	30.3	39.8	.082***
Touching/Closeness	22.7	29.9	.068**
Looks/Leers	21.3	28.8	.073***
Pressure to Engage in Comments	15.7	21.3	.136***
Attempt to Fondle/Kiss	10.3	14.9	.059**
Pressure to Date/Sexual Activities	6.5	12.8	.095***
Emails/Texts/Letters	5.6	9.7	.067**
Attempted Assault/Rape	2.4	5.3	.068**
Offer to Influence for Sexual Favors	1.8	3.8	.056*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

Table 5d shows the same behaviors regarding role in the Church. All behaviors are differently experienced by role, with laity the least likely to experience every type and clergy the most likely to experience every type except for completed assault, which was slightly more often reported by employees.

Table 5d: Percentages of Those Reporting Specific Behaviors by Role in the Church

Behaviors	Clergy (924)	Employees (306)	Laity (1075)	V
Comments/Teasing/Jokes	50.3	31.4	16.5	.337***
Touching/Closeness	39.6	25.2	10.9	.311***
Looks/Leers	36.0	23.9	10.8	.280***
Pressure to Engage in Comments	28.5	17.6	6.1	.279***
Attempt to Fondle/Kiss	18.8	10.8	4.7	.207***
Pressure to Date/Sexual Activities	12.7	9.1	3.7	.154***
Emails/Texts/Letters	11.6	6.5	1.8	.187***
Attempted Assault/Rape	4.9	3.2	1.4	.094***
Offer to Influence for Sexual Favors	3.7	2.6	0.6	.098***
Completed Assault/Rape	2.7	2.9	1.2	.055*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

A last comparison of behaviors to consider is by clergy status. There were many subgroups, but most of the differences between priests were negligible. The difference between priests, including bishops, and deacons was statistically significant and therefore notable, as seen in Table 5e. For every behavior listed, priests were more likely to report misconduct than deacons.

Table 5e: Percentages of Clergy Reporting Specific Behaviors by Ordination Status

Behaviors	Priests (573)	Deacons (84)	V
Comments/Teasing/Jokes	59.5	30.9	.192***
Touching/Closeness	55.3	20.2	.166***
Looks/Leers	43.6	13.1	.208***
Pressure to Engage in Comments	34.7	14.3	.146***
Attempt to Fondle/Kiss	21.5	5.9	.131**
Pressure to Date/Sexual Activities	13.3	8.3	.821***
Emails/Texts/Letters	14.6	5.9	.085*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

Another set of questions focused on specifically gender-based harassment, asking about behaviors that do not use sex as weapon, but slurs, taunts, stereotypes, or even threats of violence based on one's perceived gender (see Appendix A for full wording of the questions). Table 6 shows the first set of behaviors examined for all respondents. Here, the response of "not sure" is important because many of these behaviors are subtle and often hard to identify as gender-based, and even harder to report or investigate.

Table 6: Percent (n)s of Those Reporting Gender-Based Harassment Behaviors

Behaviors	Yes	Not Sure	No
Targeted Rules	9.6 (202)	14.1 (296)	76.3 (1603)
Treated Discourteously	41.7 (878)	7.3 (154)	50.9 (1071)
Contributions Overlooked	31.8 (670)	13.4 (282)	54.8 (1154)
Participation Discouraged	23.1 (486)	11.7 (246)	65.2 (1373)

The next set of behaviors are most likely to be experienced by transgender and nonbinary persons, provided in Table 7. Even though a small sample overall, note that the majority of trans or nonbinary persons reported having experienced many of these behaviors.

Table 7: Percent (n)s of Those Reporting Specific Gender-Based Harassment Behaviors by Gender Identity

Behaviors	Trans Female (7)	Trans Male (8)	Non-Binary (26)
Misgendered	57.1 (4)	75.0 (6)	23.1 (6)
Rejection/Ostracization	57.1 (4)	50.0 (4)	19.2 (5)
Failure to Recognize Your Gender	42.9 (3)	62.5 (5)	34.6 (9)
Excluded from Activities	14.3 (1)	37.4 (3)	34.6 (9)
Restroom Restrictions	0	50.0 (4)	11.5 (3)
Name Calling	25.6 (2)	12.5 (1)	11.5 (3)
Violence or Threats of Violence	14.3 (1)	12.5 (1)	0
Deadnaming (use of previous name)	25.6 (2)	62.5 (5)	7.7 (2)

As expected, the large majority (83.1%; n = 2004) of perpetrators of all problematic behaviors (sexual and gender-based) were cisgender men, with 16.2% (n = 390) as cisgender women and less than 1% (n = 18) as transgender or nonbinary (x2 = 2772.63; p < .0001).

In Church settings, the most common perpetrators were church members (38.8%; n = 446), followed by local church priests (28.8%; n = 331); in employment settings, the most common perpetrators were colleagues (44.2%; n = 168), followed by supervisors (33.9%; n = 129); in seminaries, the most common perpetrators were fellow students (48.0%; n = 84), followed by teachers and administrators (34.9%; n = 61). Notably, the most common perpetrators in all three settings were not the traditionally most powerful persons. Church members, work colleagues and fellow students have been more problematic than priests, supervisors and professors. Perhaps credential leaders have undergone training that helps minimize the chances of them being offenders, while ordinary members of a community do not necessarily receive that training.

Among the 673 who answered the question regarding their awareness of other victim/survivors of that perpetrator, 43.6% said they were aware of others. It is also likely that other perpetrators had additional victim/survivors unknown to the survey respondents. Not surprisingly, many perpetrators, from the most innocent to the most egregious, misbehave regularly, so most have multiple victim/survivors.

RESPONSES TO MISCONDUCT

Respondents who had been the recipients of misconduct were provided with a list of possible reactions.

Responses differed by gender identity, as depicted in Table 8, listed in order of percent, high to low, of all respondents.

Table 8: Percent (n)s of Those Reporting Specific Reactions to Misconduct by Gender Identity

Reactions	All	Cis Female	Cis Male	Trans/N-B	V
Ignored/Went Along	28.7 (694)	35.5 (539)	18.6 (138)	41.5 (17)	.156***
Avoided the Person	27.1 (654)	31.4 (505)	17.7 (131)	43.9 (18)	.152***
Told Colleague/Friend	19.4 (468)	23.6 (379)	9.9 (73)	39.0 (16)	.178***
Told Person to Stop	18.6 (449)	21.9 (352)	12.2 (90)	17.1 (7)	.112***
Told Supervisor	11.1 (268)	13.9 (224)	5.1 (38)	14.6 (6)	.131***
Transferred/Quit	4.7 (114)	5.7 (92)	2.4 (18)	9.7 (4)	.079**
Threatened to Report	2.3 (55)	2.9 (46)	1.1 (8)	2.4 (1)	.055*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

The majority of respondents took the path of least resistance and either ignored the behavior or avoided the person. The next largest group, looking for support, told a colleague or friend. Only after that did respondents indicate that they had taken the difficult step of telling the perpetrator to stop or reporting to a supervisor.

Respondents who indicated that they reported to a supervisor were also asked how that went. Were they believed and supported, or dismissed, or even disciplined? Table 9 provides all of the response options with the few demographic variables which yielded statistically significant associations – race, gender identity and sexual orientation. Responses are listed in order of percent selected by all respondents. Note that people of color were more likely to be trivialized, and cisgender males and LGBQ persons more likely to be believed. There were no differences by role in the Church and the other supervisor responses did not differ by any group.

Table 9: Percent (n)s of Supervisor Responses by Race, Gender and Sexual Orientation

Responses	All	White	POC	Hetero	LGBQ	Cis F	Cis M
		16.7 (42)	38.9 (7)				
Trivialized	51.1 (137)	V =	.1434*				
				36.8 (77)	54.0 (27)	36.2 (81)	55.3 (21)
Believed	39.9 (107)			V =	.138*	V =	.138*
Too Minor to Pursue	24.2 (65)						
Not Believed	20.5 (55)						
Investigation Done	18.3 (49)						
Discounted	10.8 (29)						

*p ≤ .05. **p ≤ .01. ***p ≤. 001

The survey acknowledged that there are many good reasons NOT to report, which is actually much more common. The following tables show the reasons people said they did not report an incident, with the demographic variables of difference and Cramer's V scores for strength of association. The large number of statistically significant associations warrants separate tables for each demographic analysis, but only those reasons with such a correlation are included. For each table, reasons are listed in the order selected by all respondents; the first table includes all reasons, even if no difference by demographic.

Table 10a: Percent (n)s of Those Reporting Specific Reactions not to Report by Gender Identity

Reasons	All	Cis Female	Cis Male	Trans/N-B	V
Too Minor	18.3 (338)	19.8 (243)	15.0 (89)	21.4 (6)	.059*
Nothing Would be Done	17.0 (314)	19.4 (238)	10.8 (64)	42.8 (12)	.137***
Would be Held Against Me	16.2 (300)	17.8 (219)	11.8 (70)	39.3 (11)	.109***
Too Embarrassed	9.0 (167)	9.8 (120)	6.6 (39)	28.6 (8)	.099***
Wouldn't be Believed	7.6 (141)	9.0 (110)	4.2 (25)	21.4 (6)	.105***
Would be Blamed	7.5 (139)	9.0 (110)	3.7 (22)	25.0 (7)	.124***
Didn't Know the Process	6.9 (127)	7.3 (90)	5.4 (32)	17.8 (5)	.064***
Not Hurt the Person	6.3 (117)	6.3 (77)	5.7 (34)	21.4 (6)	.078**
Loss of Income	3.6 (66)	3.8 (47)	2.9 (17)	7.1 (2)	n.s.
Retaliation Threatened	2.0 (38)	1.9 (24)	2.0 (12)	7.1 (2)	n.s.

*p ≤ .05. **p ≤ .01. ***p ≤. 001

Regarding gender differences, it is notable that the first and second choices for all cisgender respondents was that the incident was too minor, or that they feared nothing would be done. For transgender/nonbinary respondents, the top two reasons were fear that nothing would be done, followed by fear that it would be held against them. For the latter group, the idea that the incident was too minor was much further down the list at #5, after fearing embarrassment and blame. Note also that the last two reasons in Table 10a show no difference between cisgender males and females, but there is a big difference between those groups and transgender/nonbinary persons, the latter being much more likely to not know the process and to not want to hurt the person.

Table 10b: Percent (n)s of Those Reporting Specific Reactions not to Report by Sexual Orientation

Reasons	All	Hetero	LGBQ	V
Nothing Would be Done	17.7 (315)	14.8(207)	24.8 (93)	.109***
Would be Held Against Me	16.8 (299)	13.4 (188)	25.6 (96)	.136***
Too Embarrassed	9.4 (168)	7.6 (106)	15.2 (57)	.108***
Wouldn't be Believed	7.9 (141)	6.8 (96)	10.4 (39)	.055*
Would be Blamed	7.8 (139)	6.6 (92)	10.9 (41)	.068**
Financial Loss	3.7(66)	2.7 (38)	6.4 (24)	.082***

*p ≤ .05. **p ≤ .01. ***p ≤. 001

In the case of sexual orientation, LGBQ persons were more likely than heterosexual respondents to identify each of the reasons listed in Table 10b. Note that the most common response above, of seeing the incident as too minor, was not among those that differed by sexual orientation – LGBQ and heterosexual respondents were equally likely to select that.

Table 10c: Percent (n)s of Those Reporting Specific Reactions not to Report by Age Group

Reasons	All	18-39	40-59	60	V
Too Minor	18.3 (336)	25.1 (51)	23.5 (119)	14.7 (166)	.116***
Nothing Would be Done	16.9 (310)	22.7 (46)	21.3 (108)	13.8 (156)	.102***
Would be Held Against Me	16.1 (295)	27.1 (55)	19.9 (101)	12.3(139)	.139***
Too Embarrassed	9.1 (167)	14.3 (29)	11.2 (57)	7.2 (81)	.166***
Would be Blamed	7.5 (137)	12.3 (25)	10.0 (51)	5.4 (61)	.101***
Not Hurt the Person	6.2 (113)	9.8 (20)	7.1 (36)	5.1 (57)	.066*
Financial Loss	3.5 (65)	7.9 (16)	3.7 (19)	2.7 (30)	.087***

*p ≤ .05. **p ≤ .01. ***p ≤. 001

Regarding age differences, younger respondents were more likely to identify all of the reasons listed in Table 10c, with older people less likely, and those in middle life falling in between. Note that for the two most commonly cited reasons, the differences between younger and middle-aged persons are negligible. But surprisingly, older respondents were much less likely to think an incident was minor or that nothing would be done than all other respondents. If standards around these behaviors have been changing, one would expect the older respondents to be more tolerant of "minor" offenses. The differences by age group for the other reasons are more evenly spread.

Table 10d shows differences in reasons by income. Not surprisingly, lower income respondents were most likely to fear being blamed, while upper income respondents were the least likely to fear that nothing would be done.

Table 10d: Percent (n)s of Those Reporting Specific Reactions not to Report by Income Group

Reasons	All	0-$50K	$51K-$100K	$101K	V
Nothing Would be Done	17.0 (309)	16.1 (75)	19.4 (158)	14.1 (76)	.061*
Wouldn't be Believed	7.6 (139)	10.3 (48)	6.9 (56)	6.5 (35)	.059*
Would be Blamed	7.5 (136)	9.4 (44)	7.8 (64)	5.2 (28)	.061*
Didn't Know the Process	6.9 (125)	6.9 (32)	8.3 (68)	4.6 (25)	.062*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

The last examination of reasons not to report considers role in the Church. Employees were the most likely to fear financial losses, which makes sense given that the misconduct occurred in their workplace. Otherwise, clergy were the most likely to cite each of the reasons listed in Table 10e. Also notable is the strongest V-score of .224 regarding fear that the report would be held against them. This was a major concern for clergy and a bit less so for employees, both of whom might be worried about their jobs and possibilities for advancement.

Table 10e: Percent (n)s of Those Reporting Specific Reactions not to Report by Role in the Church

Reasons	All	Clergy	Employees	Laity	V
Too Minor	18.5 (339)	26.8 (173)	23.1 (53)	11.4 (105)	.188***
Nothing Would be Done	17.1 (313)	23.8 (154)	18.8 (43)	11.8 (108)	.149***
Would be Held Against Me	16.4 (299)	26.5 (171)	21.8 (50)	7.5 (69)	.244***
Too Embarrassed	9.1 (166)	12.4 (80)	8.3 (19)	6.5 (60)	.095***
Wouldn't be Believed	7.7 (140)	9.6 (62)	7.4 (17)	6.2 (57)	.059*
Would be Blamed	7.5 (138)	9.7 (63)	10.5 (24)	5.2 (48)	.090***
Not Hurt the Person	6.3 (116)	9.0 (58)	7.9 (16)	3.9 (36)	.098***

*p ≤ .05. **p ≤ .01. ***p ≤. 001

There were very few differences by race in the entire survey, but there was one statistically significant association in the case of reasons not to report: the threat of retaliation. People of color were more likely (5.9%; n = 7) to report such a threat than white people (1.8%; n = 31; V = .071**).

A text box allowed people to name other reasons for not reporting. Of the 55 responses, 38.2% (21) said they handled it themselves, followed by 20.0% (11) who said they left the local church or diocese. Another 12% (7) of respondents said that they went to a therapist instead. The few others said they were too shocked to do anything for a long time, or they were children when the incident occurred.

IMPACT OF RESPONSES TO MISCONDUCT

Participants were then asked about how their responses affected their lives. As in the previous section, the following tables show the various effects where there were demographic differences. The highest number of differences (8) were based on role in the Church, as seen in Table 11a. For this first table, all of the options are listed, including one (Things Got Worse) that showed no difference by role.

Laypersons were the least likely to report that things had gotten better, while clergy were the most likely to say that things had gotten better for others, but not themselves. Clergy were also the most likely to say that nothing had changed or that they had lost income. Employees were the most likely to say that it was hard to find another position or that the misconduct was still happening.

Table 11a: Percent (n)s of Those Reporting Specific Effects of Their Responses by Role in the Church

Effects	All	Clergy	Employees	Laity	V
Little or No Change	17.9 (383)	24.6 (204)	18.7 (51)	12.3 (117)	.185***
Things Got Better	11.1 (238)	16.4 (136)	12.4 (34)	6.5 (62)	.146***
Results Varied (multiple incidents)	10.7 (228)	16.6 (138)	13.2 (36)	4.8 (46)	.180***
Better for Me/System the Same	9.6 (205)	15.9 (132)	7.7 (21)	5.0 (48)	.172***
I Left	9.3 (198)	13.7 (114)	8.8 (24)	5.6 (53)	.131***
Things Got Worse	3.9 (83)	5.1 (42)	5.5 (15)	2.4 (23)	n.s.
Lost Income	3.6 (77)	6.4 (53)	4.0 (11)	1.3 (12)	.126***
It's Still Happening	1.5 (33)	0.7 (6)	4.0 (11)	1.4 (13)	.087***
Hard to Find New Position	1.3 (29)	1.8 (15)	2.2 (6)	0.6 (6)	.057*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

Tables 11b and 11c show the demographics with the next highest number of differences (6), gender identity and age group. Note that where respondents indicated varied results, it was because of multiple incidents.

Table 11b: Percent (n)s of Those Reporting Specific Effects of Their Responses by Gender Identity

Effects	All	Cis Female	Cis Male	Trans/N-B	V
Little or No Change	17.9 (383)	19.4 (281)	14.2 (90)	29.4 (10)	.072**
Results Varied	10.7 (228)	12.8 (186)	4.7 (30)	29.4 (10)	.142***
Better for Me/System the Same	9.6 (205)	11.1 (162)	5.4 (34)	26.4 (9)	.115***
I Left	9.3 (198)	10.7 (155)	5.4 (34)	20.6 (7)	.097***
Things Got Worse	3.9 (83)	4.8 (70)	1.9 (12)	2.9 (1)	.069**
Lost Income	3.6 (77)	4.3 (62)	2.4 (15)	0	.046*

*p ≤ .05. **p ≤ .01. ***p ≤. 001

Although few in number overall, cisgender females were the most likely to say that things got worse or that they lost income, while transgender/nonbinary respondents were the most likely to report little change at all, no change in the system, or that they left the situation (church, job, school).

Table 11c: Percent (n)s of Those Reporting Specific Effects of Their Responses by Age Group

Effects	All	18-39	40-59	60	V
Little or No Change	17.9 (383)	26.7 (65)	22.2 (139)	14.1 (174)	.125***
Things Got Better	11.1 (238)	9.9 (24)	13.8 (86)	10.1 (125)	.053*
Results Varied	10.7 (228)	20.6 (50)	14.7 (92)	6.8 (84)	.161***
I Left	9.3 (198)	14.4 (35)	11.4 (71)	7.2 (89)	.090***
It's Still Happening	1.5 (33)	5.3 (13)	2.2 (14)	0.5 (6)	.126***
Hard to Find New Position	1.3 (29)	2.5 (6)	2.2 (14)	0.6 (8)	.071**

*p ≤ .05. **p ≤ .01. ***p ≤. 001

In the case of age, younger respondents were more likely to report little/no change or having left the situation. This may be a cohort effect. That is, it is possible that raised awareness over the years has made gender-based and sexual misconduct less tolerable, so younger respondents may have a higher bar for the responses they expect in the church/workplace/school. That is, it may not be that change is not happening for younger people, or more recently, but that smaller changes were more acceptable in the past. Alternatively, it could be that younger people feel less powerful to effect the changes they desire.

Regarding income groups, there were only two differences of note. Unsurprisingly, lower income respondents were most likely to say that they had lost income (5.5%; n = 29) than those in the higher income groups (combined 3.1%; n = 48; V = .015*), and more likely to say it was hard to find a new position (2.5%; n = 13) than the others (1.0%; n = 16; V = .054*). Regarding race, people of color were more likely to say that things had gotten better for them but the system had not changed (3.6%; n = 5) than whites (0.9%; n = 19; V = .063*).

IMPACT OF MISCONDUCT ON LIVES

The next set of questions asked about impact on one's life, focusing on church/work/school participation and also personal health. Table 12a shows the full list of options, with scores for all respondents, both in percent (n)s in each category, and also the mean (m) scores from 1 to 3, with 1 indicating that things got worse to 3 indicating that they got better. The options are listed in the order they appeared in the survey, based on topic.

As noted in yellow, the most common response to almost all of the options was that there was no change, although feelings about work, mental health and emotional health were more likely to get worse – emotional health by a lot. Based on means, the options that had the best outcomes (noted in green) were school attendance, one's relationship with God and also one's spiritual practices. School attendance is likely required, but relationship with God and spiritual practices are more personal. Means highlighted in purple are the options with the worst outcomes – emotional health and feelings about work again, and also feelings about one's local church. It seems that even when one's feelings about a specific local church are harmed, one's spiritual practices and relationship with God do not suffer similarly.

Table 12a: Percent (n)s and Means on a Scale of 1-3 of Impact on One's Life

Impacts	Got Worse	No Change	Got Better	m
Worship Attendance (757)	22.1 (167)	75.6 (572)	2.4 (18)	1.81
Church Involvement (780)	28.2 (220)	68.1 (531)	3.7 (29)	1.76
Feelings about Local Church (838)	47.3 (396)	49.8 (417)	3.0 (25)	1.56
Work Attendance (655)	11.5 (75)	88.1 (577)	0.5 (3)	1.89
Quality of Work (698)	20.1 (140)	75.8 (529)	4.2 (29)	1.84
Feelings about Work (752)	49.5 (372)	47.1 (354)	1.1 (26)	1.54
School Attendance (374)	9.4 (35)	88.5 (331)	2.1 (8)	1.93

Impacts	Got Worse	No Change	Got Better	m
Quality of School Work (374)	16.3 (61)	81.6 (305)	2.1 (8)	1.86
Feelings about School (373)	25.7 (96)	72.9 (272)	1.3 (5)	1.76
Feelings about The Episcopal Church (862)	42.3 (365)	54.9 (473)	2.8 (24)	1.60
Relationship with God (1546)	21.1 (183)	64.2 (558)	14.7 (128)	1.93
Spiritual Practices (1542)	24.5 (214)	59.8 (522)	15.7 (137)	1.91
Feelings about Self (1513)	43.6 (393)	48.3 (436)	8.1 (73)	1.65
Physical Health (1563)	28.3 (241)	67.3 (573)	4.5 (38)	1.76
Mental Health (1511)	46.9 (424)	46.5 (420)	6.6 (60)	1.60
Emotional Health (1487)	56.3 (522)	36.1 (335)	7.7 (71)	1.52
Financial Health (1644)	21.3 (164)	76.4 (589)	2.3 (18)	1.81

Table 12b shows mean scores, indicating the same impacts by various demographics of interest where there was statistically significant difference between groups. Regarding gender identity, cisgender men report a higher mean than others. That is, cisgender men are more likely to report improvement than decline compared to all other respondents. On the other hand, assessment of things getting worse varied by item between cisgender women and transgender/nonbinary respondents. The same is true for heterosexuals in comparison with LGBQ respondents – the mean for heterosexuals was consistently higher, although there was only a difference on four items. Results vary more by role in the Church, with laity reporting the highest means on the three health measures listed, and clergy reporting higher means on measures related to the local church and spiritual life.

Table 12b: Means on a Scale of 1-3 of Impact on One's Life by Demographics

Impacts	CisF	CisM	TrNB	p	Het	LGBQ	p	Clergy	Emp	Laity	p
Worsh Attend	1.78	1.89	1.85	.02	--	--	n.s.	1.86	1.80	1.73	.002
Ch Involve	--	--	--	n.s.	--	--	n.s.	1.83	1.73	1.66	.000
Feel @ Loc Ch	1.51	1.70	1.36	.000	--	--	n.s.	--	--	--	n.s.
Qual Wk	--	--	--	n.s.	1.86	1.78	.05	--	--	--	n.s.
Feel @ Wk	1.48	1.69	1.57	.000	1.57	1.47	.04	1.50	1.47	1.71	.000
Sch Attend	1.93	1.95	1.67	.05	--	--	n.s.	--	--	--	n.s.
Qual Sch Wk	1.83	1.95	1.50	.002	--	--	n.s.	--	--	--	n.s.
Feel @ Sch	1.72	1.88	1.44	.002	--	--	n.s.	--	--	--	n.s.
Feel @ TEC	1.58	1.69	1.59	.04	--	--	n.s.	--	--	--	n.s.
Relat w/ God	--	--	--	n.s.	1.97	1.85	.02	1.98	1.80	1.94	.01
Spirit Pracs	--	--	--	n.s.	1.94	1.82	.02	1.95	1.79	1.90	.05
Feel @ Self	1.61	1.77	1.46	.002	--	--	n.s.	--	--	--	n.s.
Phys Health	1.72	1.90	1.64	.000	--	--	n.s.	1.73	1.75	1.90	.05
Ment Health	1.55	1.74	1.52	.000	--	--	n.s.	1.57	1.54	1.68	.03
EmoHealth	1.46	1.68	1.56	.000	--	--	n.s.	1.49	1.42	1.63	.002

Not included in the table, age by group and race were also examined. There were nine outcomes that showed difference by age group; in every case, older respondents reported higher means/more improvement than the youngest respondents, with middle-aged people falling in between. There were no differences in any outcome by race.

There was also a text box for people to write-in other effects or comments about any impact on their lives; responses varied widely. Of the 127 respondents who wrote something there, 34.6% (44) reported a positive impact, such as that the person apologized or that they developed strong boundaries as a result of the experience. However, the majority (57.5%; n = 73) reported something negative, such as lost opportunities or diminished self-esteem. The rest (15.0%; n = 19) said something more neutral, such as that the perpetrator happened to move away or retire.

WITNESSING MISCONDUCT OF OTHERS

Almost half of all respondents (42.5%) said they had witnessed someone else as the target of gender-based or sexual misconduct and another 31.2% were told about an incident by someone else, either the victim/survivor or another witness. That means a full 73.7% (812) knew of an incident, whether they themselves had experienced one or not. These respondents were then asked how they responded to that information.

With the option of "check all that apply," the most common response was to speak to someone else about it (58.2%), followed by speaking directly to the victim (48.4%). All of the other responses were about equally selected: ignored it (14.2%), spoke to the perpetrator (12.4%), initiated the misconduct process (12.1%), and reflected on one's own behavior (15.9%).

There were a few notable differences by demographic group regarding those responses. Laity were most likely to ignore the behavior (22.6%; n = 42), while clergy where the least likely to do so (10.2%; n = 50), with employees falling in between (17.3%; n = 19; V = .152***). Younger respondents were most likely to speak to the victim (60.4%; n = 67), while older respondents were the least likely to do so (39.4%; n = 157), with middle-aged persons falling in between but closer to the response rate of their juniors (55.6%; n = 163; V = .177***). Because cisgender men are most likely to be perpetrators of misconduct, it is good to see that they were most likely to reflect on their own behavior (25.5%; n = 49) if they witnessed or heard about an incident, with cisgender women (12.7%; n = 76) and transgender respondents (10.0%; n = 2; V = .151***) less likely to do so.

Many people respond to later events differently than earlier ones, based on training, growth in wisdom or courage that comes with age, or just the benefit of experience in general. One of the biggest problems with sexual misconduct in particular is delayed reporting, where an incident is ignored for a while, but is reported, sometimes years later, often with an unsatisfactory outcome because witnesses and evidence have disappeared over time. To capture some of this, an open-ended question was asked regarding what respondents would do if they witnessed a similar incident today. Of the 312 participants who wrote in a response, 59.6% said they would report it. The next most common response was something related to calling out the behavior (39.1%), either in the moment or quickly thereafter – some speaking to the perpetrator, others to the victim/survivor. It is impossible to predict future reactions based on a hypothetical, unspecified situation, but at least the intent to intercede in a more productive way is promising.

ANYTHING ELSE YOU WANT THE EPISCOPAL CHURCH TO KNOW

The last survey question allowed respondents to add anything else that might be important to them. Over a quarter (27.9%) of survey participants did so, and seven major themes were identified: personal stories, thanks, positive experiences, larger social context, lay/clergy differentials, process critiques and gender identity-related micro-aggressions.

Personal stories made up 19.7% (133) of the comments and they varied widely. Some talked about sexual assault experienced as children, others about the specific dynamics around their experience, such as a small, financially struggling church for whom reporting would have caused too much loss. One woman recounted her discovery years later that ten women had been harassed by the same bishop. Another talked about a history of multiple incidents, from a rape in a childhood parish, to inappropriate behavior of seminary professors, to various biases against them as a gay priest – retirement has finally brought a sense of relief and the ability to seek out a "safe" spiritual community.

Also notable were the 16.9% (114) who gave some message of thanks – for the survey/research and opportunity to tell their story, for the efforts at reconciliation that are underway, for educational events and other ways the Church is trying to improve. One person said simply, "Thank you for not running away from this issue."

Another large minority (12.7%; n = 86) wanted to be sure to note that their experiences have been positive, even "exceedingly wonderful" in one person's words. Many said they had not experienced any harm in the church, although they had elsewhere. Others noted that the Church has been one of the safest places in their life. Another said "I'm proud that The Episcopal Church is taking these things seriously." A few minimized the problem, saying it is not a problem in the Church, that they think the Church does a great job or is impressively open to all persons, or they have simply never even heard of an incident, but such comments were few in number. Of course, surveys on gender-based and sexual misconduct are of much more interest to people who are aware of the problem than others, so those few comments may be more common if asked of the average person in the pew.

The next largest group was the 10.2% (69) who referenced larger social issues, such as patriarchy, paternalism, homophobia, and employment discrimination related to promotions and salary inequities, all of which exist outside The Episcopal Church. These respondents seemed not to want to blame the Church for being particularly problematic, but see it as simply a part of the larger society where these issues are long standing and seemingly intractable.

Another small, but notable group (6.5%; n = 44) made reference to some element of the clergy-lay divide, most (30) concerned about lay perpetrators and the inability to hold laity accountable. There have been studies on the difficulty of people in service work holding clients accountable for their behavior for fear of losing their jobs (Good and Cooper, 2016), which applies here. Most such harassment is never reported, leaving service workers to manage the situations themselves or with close colleagues. Because many clergy work alone with few if any colleagues close by, this can be especially challenging. In addition, no clergy person wants anyone to leave the Church, but allowing misconduct to continue often serves to keep others away, who come hoping for a safe spiritual community. Still, one clergyperson asked directly, "How do you report your own parishioner?" The other 14 comments focused on the more well-known problem of clergy power, and the inability for many laypeople to effectively resist. There are problems in both directions of the clergy-lay divide, although the dynamics differ – in one case, the power of the client, in the other, the power of the leader.

Critiques of various Church processes were mentioned in 5.5% (37) of the comments. The complaint process was described as "ineffective" and "humiliating"; some simply said that offenders are not held accountable at all. One noted that alleged perpetrators have been promoted or that nothing was done, so they had to leave their diocese to get away. Respondents said that the clergy don't trust the system, partly because it is run by men. More than one noted that the effectiveness of the "system" actually depends not anything systematic, but on who one's bishop is at the time, and some bishops were named as offenders themselves.

Finally, a few respondents noted very specific elements in misconduct that are hard to address, most referencing micro-aggressions related to gender inequality. Comments included references to "the old boys club," men in high positions who lack adequate training, and the relatively small number of clergywomen in lead positions in larger churches. One clergywoman wrote broadly that, "We need models for men relating to women as spiritual leaders/advisor/mentors that do not default to the woman being either mommy or girlfriend." Another expressed her frustration, saying, "I've been afraid to voice my concerns with colleagues because doing so draws anger and hostility. After a point, it's exhausting." One clergywoman noted unwanted attention related to her appearance: "I have been told I am too beautiful to be a priest. That my hair is beautiful and requests for me to wear it in a certain way. I have been called 'spiritual eye candy.' I have been told by someone that he would need to 'be careful' working with me because he had a problem with boundaries and we 'just can't f*** each other'." Few, if any clergywomen in any denomination would be surprised with any of these comments. Repeating the concern quoted above: "How do you report your own parishioner?".

This question and others inspired some to include specific suggestions for improvements – some related to policies, processes and structures, others regarding trainings, and a few miscellaneous items. These appear in Appendix B.

SUMMARY RECOMMENDATIONS

- The demographic realities of The Episcopal Church present a few challenges, the most notable related to these issues is age; the average age of church members is older than of other Americans. The issues of gender-based and sexual misconduct are not limited to any age group, but movements for social change are often pushed and sustained by younger people, and tolerance for such behavior was more common in previous decades. To depend primarily on members who are in their 50s and 60s could make progress difficult.
- More training is needed, particularly for laity, although clergy awareness of policies and procedures should also be increased, ideally to 100%. Indeed, all training efforts could be expanded. In particular though, these data found that most perpetrators are cisgender laymen; hence they should be the main target of training programs. At the same time, support structures should be developed for their most common victim/survivors – clergywomen and transgender/nonbinary clergy. If there was a single theme throughout the comments, it was that clergy do not know how to respond to harassment of themselves without alienating parishioners.
- Although past trainings received positive reviews overall, they might also be improved with updated materials. The challenge here is making sure everyone attends such a training, easier to require of clergy than laity. Because most perpetrators are laypersons, work colleagues and fellow students, it will be especially important to make sure the trainings focus not only on the typical power differentials that lead priests, supervisors and professors to offend, but also the dynamics around the harassment of service providers and peers.
- Training should pay particular attention to gender-based micro-aggressions, which are often subtle. Focus should also be not only on discrimination to cisgender women, but also to transgender and nonbinary persons, who appear to be very likely to experience misconduct in the Church. People should also be trained in tactics to respond when they witness an incident, since respondents indicated a desire to act in such situations. Knowing what to say or do ahead of time will make that more likely.
- Processes for reporting and investigation need to be reviewed to make sure they are effective so they can be trusted by those currently hesitating to make reports. Clergy and employees particularly fear that a report would be held against them, so reporters must be protected from retaliation by supervisors, in their steps toward ordination, and by bishops and others in authority. Many suggested that there be more evenness across dioceses or that complaints be handled by persons outside of the bishops' offices, even outside of the clergy structures, where people perceive there is an attempt to protect each other – an "old boys club." Some bishops have handled cases well, while others have not.

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Continuance recommendation

Our Task Force requests that we be allowed to continue our work as a Task Force of the General Convention for the next 2 triennia, recognizing the continued challenges the current pandemic has created for the entire world. We ask that a budget of $157,000 be allocated to our work for the next triennium. This will allow for three in-person meetings over the next triennium, consulting fees as we develop training modules, and costs associated with the beginning work for truth and reconciliation. See the summary of work for further explanation of the need for this Task Force to continue.

Supplemental Materials

Table of contents:

APPENDIX A: SURVEY INSTRUMENT

The online version of the survey below also included skip logic, programmed to move respondents to subsequent questions based on their responses to previous questions. That skip logic does not appear here.

This first section will allow us to identify patterns in the data based on demographics.

1. In what year were you born?

2. What is your gender identity?

- Female Cis (woman whose gender identity corresponds with that of her assigned sex)
- Female Transgender (woman whose gender identity differs from that of their assigned sex or those who are not exclusively masculine or feminine)
- Male Cisgender (man whose gender identity corresponds with that of his assigned sex)
- Male Transgender (man whose gender identity differs from that of their assigned sex or those who are not exclusively masculine or feminine)
- Non-Binary (one who may express their gender through a combination of masculinity and femininity or neither; aka genderqueer)

3. What is your sexual orientation (select all that apply)?

- Asexual
- Bisexual
- Gay
- Heterosexual
- Lesbian
- Pansexual
- Other (please specify): ____

4. What is your race/ethnicity? (select all that apply)

- Asian or Pacific Islander
- Black or African American
- Hispanic or Latinx
- Native American or Alaska Native
- White or Caucasian
- Other (please specify): ____

5. What is the highest educational level you have completed?

- Less than HS
- Some High School
- High School or GED
- Associate's Degree or Vocational Certificate
- Bachelor's Degree
- Graduate Degree

6. In what range is your gross annual income?

- 0 - $25,000
- $25,001 - $50,000
- $50,001 - $75,000
- $75,001 - $100,000
- $100,001 - $150,000
- $150,001 - $250,000
- More than $250,000

7. What is your role in the Episcopal Church (select all that apply)?

- Full-time Clergy
- Part-time Clergy
- Non-Stipendiary/Volunteer Clergy
- Retired Clergy
- Member of Religious Order
- Postulant/Candidate for Holy Orders
- Layperson
- Employee at a Local Church
- Employee at an Episcopal Church Institution/Agency (such as Diocesan Office, Camp/Retreat Center, College Chaplain)
- Employee at an Educational Institution
- Seminary Student
- Student in a Local Ordination Training Program

8. I am a (select all that apply):

- Bishop
- Bishop Suffragan
- Dean of Cathedral
- Rector with Clergy (Priest/Deacon) Staff
- Priest in Charge/Interim with Clergy (Priest/Deacon) staff
- Solo Rector
- Solo Priest in Charge/Interim
- Associate Rector
- Priest on Church Staff
- Priest on Non-Church Staff
- Deacon on Church Staff
- Deacon on Non-Church Staff
- Diocesan Canon/Staff
- Military Chaplain
- Hospital Chaplain
- School Chaplain
- Other (please specify): ____

9. That educational institution is

- an Episcopal Seminary
- an Episcopal College
- an Episcopal School
- a Deacon or Local Ministry Training Program

10. If you attend/serve a church, approximately how many persons attend on a regular Sunday? If a deacon/priest serving multiple churches, estimate the total for all churches.

- 1 - 49
- 50 - 149
- 150 - 349
- 350 or more
- I do not attend/serve an Episcopal Church.

11. My Episcopal Province/Diocese (broken down in more detail than appears here) is:

- I (CT, ME, MA, NH, RI, VT)
- II (Cuba, Europe, Haiti, NJ, NY, Virgin Islands)
- III (DE, MD, PA, VA, Washington DC, WV)
- IV (AL, GA, FL, KY, Eastern LA, MS, NC, SC, TN)
- V (IL, IN, MI, Eastern MO, OH, WI)
- VI (CO, IA, MN, MT, NE, ND, SD, WY)
- VII (AR, KS, NM, Western LA, Western MO, TX, OK)
- VIII (AK, AZ, CA, HI, ID, Micronesia, NV, OR, Taiwan, UT, WA)
- IX (Colombia, Dominican Republic, Ecuador, Honduras, Puerto Rico, Venezuela)
- Not sure or Does not apply

The next few questions ask about your awareness of policies and programs in The Episcopal Church.

12. Are you familiar with The Episcopal Church's sexual misconduct policies? Or that we have sexual misconduct policies?

- Yes, I know the policies fairly well.
- I don't know the exact policies, but I know that they exist.
- I'm not sure.
- No, I really don't know anything about such policies.

13a. Would you know where within The Episcopal Church to report an incident of sexual misconduct?

- Yes
- Not sure
- No

13b. Where would you report such an incident?

14. Are you aware of any Episcopal Church sponsored educational programs dealing with sexual misconduct?

- Yes
- Not sure
- No

15a. Have you ever attended such an event?

- Yes
- No

15b. What event did you attend?

15c. Did you find that event helpful?

- Very much so
- Somewhat
- Minimally
- Not at all

15d. What would have made it better?

16a. Are you aware of an Episcopal Church related agency providing services to victims of sexual misconduct?

- Yes
- Not sure
- No

16b. What agency/ies do you know about and what services to they provide?

The next section asks about your experiences with sexual or gender-based misconduct in TEC.

17a. Have you ever received any of the following types of unwanted sexual attention or gender-based aggression/discrimination in an Episcopal Church?

	Church	School	Office	Not in an EC setting
Looks and leers				
Touching or closeness				
Attempt to fondle or kiss				
Gender-based comments, teasing or jokes				

	Church	School	Office	Not in an EC setting
Pressure to engage in gender-based comments, teasing or jokes				
Sexual emails, texts or letters				
Pressure for dates or sexual activities				
Offer to influence in return for sexual favors				
Attempted sexual assault/rape				
Completed sexual assault/rape				

17b. What aspect of your identity was the focus of the misconduct (select all that apply)?

- Your gender
- Your sexual orientation
- Your race/ethnicity
- Your order
- Something else
- Not sure

17c. The unwanted behavior/s was/were initiated by (select all that apply):

	Status		Gender		
	Clergy	Lay	Female	Male	Trans/Non-Binary
Denominational Leader (Bishop, Diocesan Staff, etc.)					
Local Church Priest					
Local Church Deacon					
Other Local Church Leader					

	Status		Gender		
	Clergy	Lay	Female	Male	Trans/Non-Binary
Local Church Member					
Workplace Supervisor					
Workplace Colleague					
Workplace Client					
Seminary/Formation Program Instructor or Admin					
Field Ed Supervisor					
Seminary/Formation Program Student Colleague					
Other					

17d. Are you aware of anyone else who experienced gender-based or sexual misconduct by this/these person/s?

- Yes
- In some cases, yes, but not all
- No
- Not sure

18. Have rules ever been made in your church, school or workplace which were targeted at you, or enforced for you and not others, because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

19. Have you been treated with less courtesy/respect than other people because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

20. Have your contributions been overlooked or credited to someone else, because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

21. Have you ever been discouraged or pushed out of a position or participation in a church/program because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

22. Have you ever experienced any of the following because of your gender/gender identity (select all that apply)?

- Mis-gendering
- Rejection/Ostracization
- Failure of people to recognize your gender identity
- Exclusion from gender-specific activities
- Restroom restrictions
- Name calling
- Violence or threats of violence
- Dead-naming (use of previous name)
- Other (briefly describe): ______________________________
- No

23. Have you ever experienced any of the following because of your sexual orientation? (select all that apply)?[1]

- Rejection/Ostracization
- Failure to recognize your orientation as legitimate
- Failure to recognize your partner/spouse as legitimate
- Name calling
- Other (briefly describe): ____
- No

24. In what decade(s) (if at all), did you have any experiences of gender-based/sexual misconduct occur (select all that apply)?

- Before 1970
- 1970s
- 1980s
- 1990s
- 2000s
- 2010s
- I have never experienced gender-based/sexual misconduct in an Episcopal Church setting.

25. How did you respond to any unwanted behaviors (select all that apply)?

- Ignored it, went along with it, minimized it or made a joke of it
- Avoided the person
- Told the person/s to stop
- Threatened to tell others
- Told a colleague/friend/church member
- Told a supervisor
- Requested a transfer or quit
- Other (briefly describe): ____

26. How did your supervisor respond (select all that apply)?

- An investigation was done
- I was believed and supported and appropriate corrective action was taken
- My complaint was trivialized, minimized or dismissed
- I was discounted and disciplinary action was taken against me

- I was told the behavior does not meet the threshold for an investigation
- I was not believed
- Other (briefly describe): ____

27. People choose not to make a formal complaint for many good reasons. What were your reasons for not reporting to a supervisor (select all that apply)?

- I did not know the reporting process.
- I considered the behavior minor and saw no need to report it.
- I did not want to hurt the person.
- I was too embarrassed.
- I didn't think anyone would believe me.
- I didn't think anything would be done.
- I feared it would be held against me or that it would affect my future.
- I was afraid of losing income.
- I feared I would be blamed.
- I was threatened with retaliation if I reported.
- Something else (briefly describe): ____

28. Overall, what difference did your response/s make (select all that apply)?

- Overall, things got better.
- There were multiple incidents and results varied.
- Overall, things got worse.
- Little or no change.
- Things got better for me, but nothing changed in the system.
- Things got better for others, but not for me.
- I had to help myself by leaving.
- I am still in the situation.
- I have lost income.
- I am having a hard time finding a new position.
- Something else: ____

29. How did your experience/s affect you?

	Got worse	No impact	Improved	DNA
My worship attendance				
My local church involvement				
My feelings about my local church				
My attendance at work				
The quality of my work				
My feelings about my work				
My attendance at school				
The quality of my school work				
My feelings about school				
My feelings @ The Episcopal Church				
My feelings about myself				
My relationship with God				
My spiritual practices				
My physical health				
My mental health				
My emotional health				
My financial health				

30.Was there any other impact on your life?

- No
- Not sure
- Yes (briefly describe): ____

31a. Have you ever witnessed any behaviors noted in previous questions in an Episcopal Church setting?

- Yes, I have witnessed one/some.
- I have not witnessed any, but it has been reported to me by the victim.
- I have not witnessed any, but it has been reported to me by someone other than the victim.
- No, I have never witnessed any of the above behaviors.
- Not sure.

31b. What was your response to witnessing and/or being informed of this behavior (select all that apply)?

- Ignored it/Did nothing
- Spoke with the victim only
- Spoke to the perpetrator only
- Began misconduct proceedings
- Reflected on my own behaviors that may be similar
- Shared my concerns with another person (Bishop, Rector or Colleague)
- Something else (briefly describe): ____

31c. Given raised awareness of sexual misconduct today, what would your response be if you saw the same behavior today?

- The same
- Different (briefly describe) ____
- Not sure

32. Is there anything else you'd like to say about gender-based/sexual misconduct in The Episcopal Church, related to your own experiences, or more generally?

APPENDIX B: SPECIFIC SUGGESTIONS FOR IMPROVEMENTS

- There is no recourse against misbehavior by a **lay** church member, and that's a problem. We have to make it safer to report lay people, especially big givers; too bad lay members aren't required to take the training pre-confirmation.
- Attention must be paid to those of us who have been assaulted by **laypeople**. There needs to be action, not talk. Changes must be made in canon law church-wide to protect us. We need to be believed and taken seriously. We need the same procedures and protections that victims of clergy abuse receive. Simply telling us to go to court is neither helpful nor kind.
- It might be helpful to have **separate training programs** for men and women. For men to get really honest about their behavior, even the seemingly innocent stuff and for women to equip then better to protect themselves, recognize the early signs of grooming, and give them some real encouragement and tools to report.
- What sexual misconduct policy applies at **seminaries?** Title IX or Title IV. It is confusing and not clear to seminarians.
- I believe we need to make clear ways for **associates/assistants/curates** to make reports against rectors that protect the victim. The way our polity is set up makes it very scary to report anything against a rector because it currently seems most likely that the victim (associate/curate) will be the one who loses their job and has long-term consequences for the incident. I know so many (mostly female) associates who have experienced this behavior.
- Often, it **depends entirely on the bishop** as to whether there is support. Bishops are beholden to the parish for their paychecks, and not many, in my experience, are comfortable challenging the people who pay their salaries. Unless real, tangible, systemic change is made (more than token liturgies - in transparent misconduct proceedings that do not rely on Diocesan staff to be intake officers while unwilling to challenge their employer - or who themselves are also inappropriate in their behavior) then there will be no accountability and little ability to challenge the status quo.
- The **alcohol culture** at church meetings results in a lot of inappropriate incidents.
- **Leaflets in the bulletins** with training announcements would be great.
- I wish we could have **mandatory misconduct training that has more teeth**. The reporting **process should be the same in every diocese,** and **victims should be able to see the final copy of their own reports**. It is too sensitive an event for it to be simply transcribed by someone who wasn't there, after an interview, with no review by the victim to insure it is accurate.

- One thing I would love to see is the Canon to the Ordinary or appointee check in after 6 months or a year to see how you are doing and see if there is anything to do to help. After a priest does something like this, the Canon is the front line of the church. I would have appreciated more **communication** regarding the progress and ending of the investigation that stemmed from my incident.
- Information about our Title IV processes is still very spotty depending upon the diocese. People still suffer needlessly. There does not appear to be a way to **make sure that our Bishops do their own due diligence** in relationship to our Canons.
- Our current canons, which only have mechanisms that are very punitive, still leave room for **a lot of conduct to go unchecked. There is a lot of conduct that shouldn't raise to the level of "removal from ministry" that should be addressable**. We should also have better mechanisms for holding lay people to account/inviting change.
- Publish **new materials**. Make it online on YouTube, and broadly available. Make it super easy for anyone to learn. Make vignettes. 7 min video about one topic. You will need 20 videos not one or two.
- My only major advice is to do a huge **overhaul of safeguarding**. As someone who experienced sexual assault NOT in the Episcopal Church as a youth, I think the program is poorly done and triggering. Programs should also be available to offer guidance to anyone going through safeguarding who may need additional support afterwards. While I was fine mentally after the sessions, a peer in my cohort left the program obviously distraught. It was obvious that it had an impact on several people within the class, and I think the training could be done with more tact.
- I would like to see churches **post salaries** for open positions (clergy and lay) and stick to them, rather than allowing "room for negotiation" (which always penalizes female and POC candidates), and somewhere to turn when a Title IV complaint quietly fizzles because the priest in question is a friend of the bishop.
- A **simple, clear outline** of applicable offenses and reporting procedures would be helpful.

TASK FORCE TO ASSIST THE OFFICE OF PASTORAL DEVELOPMENT

Membership

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

Changes in Membership

The Rev. Canon Rafael Zorilla, 2018

Acknowledgements

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

Mandate

Resolutions 2018-A147 & 2018-A189

2018-A147 Pilot Board for Episcopal Transitions

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

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

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

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

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

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

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

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

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

formalizing and expanding recruitment and training for Transition Consultants;

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Summary of Work

THEOLOGICAL AND ECCLESIASTICAL CONTEXT

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

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

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

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

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

By processes defined in the general canon, diocesan canons, and parochial by-laws, we invest some of our baptismal authority in one another for specific duties by electing vestry members and wardens; delegates and deputies to diocesan and general conventions, respectively; committee and commission members in congregations, dioceses, and the wider church; and by ordaining deacons, priests, and bishops. And in the mystery of God, the baptismal authority we invest in one another is received not as authority, but as responsibility. It is received not as power over, but as accountability for.

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

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

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

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

-Bishop Mark Hollingsworth

SUMMARY OF WORK

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

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

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

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

BEST PRACTICES DATABASE UPDATED AND CONDENSED

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

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

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

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

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

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

Findings

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

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

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

Recommendations

Identification, Recruitment, and Selection of Consultants

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

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

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

Training of Search Consultants

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

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

Evaluation of Episcopal Search Consultants

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

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

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

At the completion of the consultation, each of the collected 360 evaluations would be collated by the Office of Pastoral Development. The consultant evaluations would be read by the Bishop of Pastoral Development as well as a member of the Bishop for the Office of Pastoral Development's council of advice, and either an active or retired consultant, as well as the search consultant. At this point, reflection, education and coaching can take place in a way that should become normative to the system.

Recommendations for Future Work

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

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

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

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

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

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

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

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

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

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

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

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

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

...

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

STEPS IN THE DISCERNMENT PROCESS REGARDING BACKBGROUND SCREENING AND EVALUATIONS

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

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

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

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

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

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

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

NEED FOR EXPANDED PSYCHOLOGICAL AND ADDICTIVE BEHAVIORS SCREENING

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

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

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

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

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

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

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

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

PRACTICES FOR GATHERING AND SHARING INFORMATION GATHERED IN EPISCOPAL SEARCH PROCESSES

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

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

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

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

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

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

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

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

- At the beginning of the search process, every applicant signs a release and waiver forms expressly giving search committees, Standing Committees, the Office of Pastoral Development and others with a “need to know” the right to see all information gathered about an applicant including, but not limited to public records, medical evaluations, psychological evaluations, behavioral health evaluations, and substance abuse evaluations as well as granting all of those persons the right to consult with evaluators and experts.

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

The routine practice would be as follows:

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

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

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

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

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

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

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

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

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

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

DEVELOP PROCESSES AND RESOURCES TO ENCOURAGE DIVERSITY IN THE EPISCOPATE

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

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

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

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

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

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

RESOURCES TO ENCOURAGE A DIVERSE APPLICANT POOL

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

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

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

In 2019-20, several bishops and spouses were invited to contribute short videos on the particular questions such as, "how did you discern your call?", "what have you learned since you became a bishop (or your spouse has become a bishop?"), "what has been your leadership style?", and finally, "what's the life of a bishop (and their spouse) like?". Because the pandemic changed our plans to have these videos professionally recorded, they have been created informally and, as of this writing, are planned to be posted on the TEC website as "Discerning Holy Orders". Their purpose is so that anyone who might be curious about a call to the episcopate could explore, in an accessible way, some of their own questions before embarking on a formal discernment process. As we noted, the work of cohort groups and coaches has contributed to the increased diversity in those seeking a call to the episcopate, and the Task Force believes that this additional resource of the church might permit someone who has not had access to either cohort or coaches begin the explore their own questions about a call to the episcopate.

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

Budget

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

Proposed resolutions

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

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

III.11.1

Sec. 1

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

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

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

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

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

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

2. each nominee evaluated by a licensed medical doctor approved by the Standing Committee;

3. each nominee evaluated by a licensed psychologist approved by the Standing Committee, with psychiatric referral if desired or necessary;

4. each nominee evaluated for substance, chemical and alcohol use and abuse and other addictive patterns whether as part of the medical examination, psychological examination or otherwise by professionals approved by the Standing Committee;

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

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

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

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

EXPLANATION

This Resolution has several purposes. One is to bring a degree of consistency to the discernment screening and evaluations that are conducted for those in discernment (or reception) processes to become a Priest or Deacon and those used when a Bishop is elected. Currently, background screening and medical, psychological, and psychiatric evaluations are conducted prior to ordination or reception from another denomination or Province of the Anglican Communion for Priests, Deacons, and Bishops of other Provinces of the Anglican Communion who will serve as Assistant Bishops. Currently the canons do not require any background screening or evaluations prior to the election of a Bishop for a Diocese. It is only after an election that the Bishop-elect must have medical, psychological, and psychiatric evaluations, even though the recommended process and wide-spread practice is to conduct background screening and medical, psychological, and psychiatric evaluations on all those who are nominated. This Resolution would make that best practice a requirement.

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

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

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

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

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

Canon III.11.3

Sec. 3

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

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;

2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and

3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

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

(Date) ____

(Signed) ____

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

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

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

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

(Signed) ____

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

And be it further.

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

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

EXPLANATION

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

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

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

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

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

Canon III.11

Sec. 1

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

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

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

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

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

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

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

EXPLANATION

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

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

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

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

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

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

Canon III.6.5.j

Sec. 5. Preparation for Ordination

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

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

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

Canon III.8.5.k.2

Sec. 5. Preparation for Ordination

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

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

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

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

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

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

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

1. The Holy Scriptures.

2. History of the Christian Church.

3. Christian Theology.

4. Christian Ethics and Moral Theology.

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

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

h. Preparation for ordination shall include training regarding

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

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

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

4. the Church's teaching on racism.

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

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

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

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

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

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

Canon III.10.1.b

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

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

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

Canon III.11.3.a.2

Sec. 3

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

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;

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

3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

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

(Date)________________________

(Signed)______________________

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

And be it further;

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

Canon III.6.5.j

Sec. 5. Preparation for Ordination

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

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

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

Canon III.10.1.b

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

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

Canon III.11.3.a.2

Sec. 3

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

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

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;

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

3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

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

(Date)______________________

(Signed)____________________

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

EXPLANATION

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

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

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

A083 Amend Various Canons Regarding Screening Prior to Ordination or Reception

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

III.6

Sec. 5. Preparation for Ordination

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

b. The Bishop may assign the Postulant or Candidate to any congregation of the Diocese or other community of faith after consultation with the Member of the Clergy or other leader exercising oversight.

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

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

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

f. Before ordination each Candidate shall be prepared in and demonstrate basic competence in five general areas:

1. Academic studies including, The Holy Scriptures, theology, and the tradition of the Church.
2. Diakonia and the diaconate.
3. Human awareness and understanding.
4. Spiritual development and discipline.
5. Practical training and experience.

g. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
4. the Church's teaching on racism.

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

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

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

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

2. medical*,* ~~and~~ psychological*, and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral.

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

and be it further;

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

III.8

Sec. 5. Preparation for Ordination

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

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

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

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

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

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

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

1. The Holy Scriptures.
2. History of the Christian Church.
3. Christian Theology.
4. Christian Ethics and Moral Theology.
5. Christian Worship according to the use of the Book of Common Prayer, the Hymnal, and authorized supplemental texts.
6. The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, and the historical and contemporary experience of racial and minority groups.

h. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.
4. the Church's teaching on racism.

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

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

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

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

2. medical*,* ~~and~~ psychological*, and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral.

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

and be it further;

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

III.8.

Sec. 7. Ordination to the Priesthood

a. A person may be ordained Priest:

1. after at least six months since ordination as a Deacon under this Canon and eighteen months from the time of acceptance of nomination by the Nominee as provided in III.8.2.b, and

2. upon attainment of at least twenty-four years of age, and

3. if the medical evaluation, psychological evaluation, *substance, chemical and alcohol use and abuse and other addictive patterns evaluation,* and background check have taken place or been updated within thirty-six months prior to ordination as a Priest.

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

1. an application from the Deacon requesting ordination as a Priest, including the Deacon's dates of admission to Postulancy and Candidacy and ordination as a Deacon under this Canon,

2. a letter of support from the Deacon's congregation or other community of faith, signed by at least two-thirds of the Vestry and the Member of the Clergy or other leader exercising oversight,

3. evidence of admission to Postulancy and Candidacy, including dates of admission, and ordination to the Diaconate,

4. a certificate from the seminary or other program of preparation, written at the completion of the program of preparation, showing the Deacon's scholastic record in the subjects required by the Canons, and giving an evaluation with recommendation as to the Deacon's other personal qualifications for ordination together with a recommendation regarding ordination to the Priesthood, and

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

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

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

(Signed) ____

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

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

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

and be it further;

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

III.10

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

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

b. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.

c. evidence of training regarding

1. prevention of sexual misconduct.

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

3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.

4. training regarding the Church's teaching on racism.

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

e. Prior to reception or ordination each clergy person shall be assigned a mentor Priest by the Bishop in consultation with the Commission on Ministry. The mentor and clergy person shall meet regularly to provide the clergy person an opportunity for guidance, information, and a sustained dialogue about ministry in The Episcopal Church.

and be if further;

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

III.11.

Sec. 3

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

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;

2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological, ~~and~~ psychiatric *and substance, chemical and alcohol use and abuse and other addictive patterns* conditions and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and

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

(Date) ____

(Signed) ____

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

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

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

(Signed) ____

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

EXPLANATION

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

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

Continuance recommendation

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

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

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

For the next triennium we request $150,000.

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

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

Supplemental Materials

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

Bishop Consecrations

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

Job Description for Episcopal Search Consultants

Role and Responsibilities

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

Qualifications, Gifts and Skills

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

Core Competencies for Clergy and Pastoral Ministers Addressing Alchohol and Drug Dependence and Other Addictive Behaviors

Knowledge

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

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

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

Pastoral Knowledge and Skills

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

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

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

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

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

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

Information Gathering Process About Applicants in Episcopal Search Processes

- Obtain information from the applicant.
    - Property drafted release and indemnification forms from the applicant must beobtained
- Application including education history, employment history, military history, etc.
    - Some sort of behavioral history questionnaire
    - Medical history
    - Misconduct history including Title IV
    - Mental health, behavioral health, substance abuse history
    - Criminal, credit, name changes, motor vehicle, legal proceedings history including domestic and bankruptcy
    - Social media presence
- Extensive interviews with applicant
- "Ten Tough Questions" (it is actually many more than that) typically asked by the Chancellor or some other person at a discernment retreat
- Other?
- Verify information obtained from the applicant.
    - Obtain education records for anything other than bachelor's degree and initial"seminary" or other theological education used to obtain ordination to the diaconate and priesthood.
    - Verify employment in The Episcopal Church with Recorder of Ordinations
    - Verify any other post-ordination employment outside The Episcopal Church
- Obtain information from Experts and Others
    - Medical evaluation
    - Psychological evaluation
    - Behavioral evaluation
    - Substance abuse evaluation
    - Reference checks- both of all those supplied by the applicant and blind referencesnot supplied by the applicant

- Evaluate the Information.
    - Consultation on meaning of criminal, legal proceedings, credit and other publicrecords
- Make Decisions about the applicant in light of gathered Information

The Screening Process - The Discernment Retreat and Beyond

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

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

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

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

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

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

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

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

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

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

Psychological Evaluation

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

- Personality/Character disorders
- Dual diagnoses
- Conduct disorders

In addition, the psychological evaluation needs to expose the following disorders which may notdisqualify an applicant but would require focused evaluation to provide information for a search committee’s discernment.

- Depressive and anxiety disorders
- Addiction(s)

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

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

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

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

Psychological Screen Examination Details

Prior to the psychological evaluation appointment:

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

Discussion of items from the Behavioral Screening Questionnaire

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

Day One:

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

Day Two:

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

Handling of Information Yielded by Psychological Evaluation and Other Screening

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

General principles:

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

Fundamentally, we can envision three broad outcomes from psychological evaluation

All Clear (green light)

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

Area(s) of Concern (yellow light)

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

Continuation in discernment is contraindicated (red light)

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

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

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

Specific flow of Information from the proposed process

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

Retention and Destruction of Background Screening and Various Evaluations

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

TASK FORCE TO COORDINATE ECUMENICAL & INTERRELIGIOUS WORK

Membership

The Rt. Rev. R. William Franklin, *Chair*	Western New York, II	2024
The Rev. Canon Dr. C. Denise Yarbrough, *Vice-Chair*	Rochester, II	2024
The Rev. Canon Sharon Alexander	West Tennessee, IV	2021
The Ven. Dr. Walter Baer	Convocation of Episcopal Churches in Europe, II	2024
The Rev. Canon Valerie Balling	New Jersey, II	2021
Ms. Kate Bellam	Connecticut, I	2024
The Rev. Jaime Briceño	Chicago, V	2024
The Rt. Rev. Scott Hayashi	Utah, VIII	2024
Dr. Lucinda Mosher	Florida, IV	2024
The Rev. David Simmons	Milwaukee, V	2024
The Rt. Rev. Eugene Sutton	Maryland, III	2024
The Rev. Marisa Tabizon Thompson	Nebraska, VI	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rev. Luz Cabrera (2019-2020), replaced by The Rev. Valerie Balling (2020-present)

Acknowledgements

Margaret Rose; Chuck Robertson, Richard Mammana (TEC), Hank Jeannel (TEC EIR intern); Kyle Tau (UMC);

Mandate

2018-D055 Coordination of Ecumenical and Interreligious Work

Resolved, the House of Deputies concurring, That the 79th General Convention, pursuant to Joint Rule IX.22, create a task force with membership appointed by the Presiding Bishop and the President of the House of Deputies to report annually to the Standing Commission on Structure, Governance, Constitution and Canons (SCSGCC) its work in addressing matters of ecumenical and interreligious significance, including but not limited to: respond to ecumenical and interreligious issues that may arise between meetings of General Convention; have primary responsibility for developing responses to ecumenical and interreligious documents; assist the Presiding Bishop, appropriate DFMS staff, and the Executive Council with formulating and implementing ecumenical and interreligious policy; and provide such other assistance and counsel to the SCSGCC with respect to matters that come before the SCSGCC that have ecumenical or interreligious significance, in collaboration with the Deputy for Ecumenical and Interreligious Relations and Episcopal Diocesan Ecumenical and Interreligious Officers; and be it further

Resolved, That the task force shall begin on January 1, 2019, and end at the end of the 81st General Convention, unless its mandate is extended by that Convention; and be it further

Resolved, That the task force shall provide an interim report to the 80th General Convention; and be it further

Resolved, That the membership of this task force include up to three Bishops appointed by the Presiding Bishop for six-year terms; up to three Priests and/or Deacons and up to three lay persons appointed by the President of the House of Deputies for six-year terms; and up to three members of the SCSGCC appointed by the SCSGCC.

Summary of Work

Resolution D055 of the 79th General Convention of The Episcopal Church (TEC) in 2018 established a Task Force of the Standing Commission on Structure, Governance, Constitution and Canons (SCSGCC) with the mandate to coordinate and respond to ecumenical and interreligious issues that may arise between meetings of General Convention; have primary responsibility for developing responses to ecumenical and interreligious documents; assist the Presiding Bishop, appropriate DFMS staff, and the Executive Council with formulating and implementing ecumenical and interreligious policy; and provide such other assistance and counsel to the SCSGCC with respect to matters that come before the SCSGCC that have ecumenical or interreligious significance, in collaboration with the Deputy for Ecumenical and Interreligious Relations and Episcopal Diocesan Ecumenical and Interreligious Officers.

Throughout the triennium, the Task Force to Coordinate Ecumenical & Interfaith Work (TFCEIW) met as an interim body electronically and by sub-committee to further the work to achieve its mandate. The membership of this task force is directed to include up to three Bishops appointed by the Presiding Bishop for six-year terms; up to three Priests and/or Deacons and up to three lay persons appointed by the President of the House of Deputies for six-year terms; and up to three members of the SCSGCC appointed by the SCSGCC.

This task force is working to create communication and consistency across the various ecumenical and interfaith efforts of TEC, especially in reference to policies and "like" documents and agreements. It is embracing the philosophy articulated by the Rev. Margaret Rose that denominational ecumenical work is about "engaging the other; knowing ourselves," and aiming to bridge the gaps in work across faith groups without filling them in at the loss of Episcopal identity.

TASK FORCE STRUCTURE AND AREAS OF FOCUS

Following initial discussion on the work that is and should be happening under this umbrella, four sub-committees were developed to address the mandate: Governance; Theology; Anglican Communion, Europe; Bi-Lateral Discussions. Additional ecumenical and interfaith projects are being acted upon by individuals or TEC staff members.

Governance (David Simmons, chair):

The primary aim of this sub-committee is the determination of resolutions that need to be proposed at the 80th General Convention. Aspects of this include reviewing past resolutions, writing continuing resolutions for ongoing work, and working with the other sub-committees to identify and craft new legislative proposals and resolutions. The final compilation of resolutions being proposed are found later in this Blue Book application.

Theology (Denise Yarbrough, chair):

The work of this sub-committee is centered in the confluence of interreligious work and issues of intersectionality, anti-Semitism work (perhaps with consultation from the Anti-Defamation League), and various statement updates. Following the review of current overarching TEC documents in this area, the sub-committee noted that the TEC documents on Jewish-Christian Guidelines and on interfaith relations have not been reviewed in many years. As such, this sub-committee is in the process of reassessing and drafting updated statements to be offered to TEC for study and potential future legislative resolutions by the 81st General Convention.

United Methodist Church (UMC) and Other Full Communion Discussions (Scott Hayashi, Chair):

The primary focus of this subcommittee is the UMC-TEC work. A successful joint gathering in Utah was held that might serve as a model for other areas. Originally, this sub-committee and Task Force intended to bring legislation around this proposal to General Convention in 2020; however, the pandemic prevented the UMC from gathering as expected in 2020 to determine their future. Thus, TEC is also holding on presenting or confirming formal legislation with UMC at this time.

In addition, ARCUSA, LECC, MECC, PCUSA, ELCA, and the four way agreement between the Evangelical Lutheran Church of America, the Anglican Church of Canada, the Evangelical Lutheran Church in Canada, and TEC, are under the umbrella of this subcommittee and will lead to legislative proposals.

Anglican Communion, Europe, and related (Eugene Sutton and Walter Baer, co-chairs):

This sub-committee is charged with the review of relationships and assembly of potential legislation to be considered at General Convention relating to partnerships in Europe. The memorandum of understanding with the Church of Sweden, the dialogue with the Evangelical Church of Bavaria, and the work of the Committee of Anglican Bishops in Europe are central to the charge of this subcommittee. Additionally, the Lambeth Conference originally scheduled for 2020 directed some of the work of this group. Specific information and proposals from these discussions follow.

Resolutions Referred to the Task Force on Ecumenical Relations in Europe

Resolution 2018-C059 Commend Dialogue with the Evangelical Church in Bavaria

Resolved, That the 79th General Convention approve and commend the existing relationship between the Convocation of Episcopal Churches in Europe (Convocation) and the Evangelisch-Lutherische Kirche in Bayern (ELKB) (Evangelical Church in Bavaria); and be it further

Resolved, That the 79th General Convention approve and commend the process of exploring deeper relations and the dialogue toward full communion between The Episcopal Church and the ELKB.

Resolution 2018-D085 Communion Relationship with Church of Sweden

Resolved, That the 79th General Convention acknowledge and affirm the existing full communion relationship between The Episcopal Church and the (Evangelical Lutheran) Church of Sweden, in furtherance of the 78th General Convention's Resolution B004, which received and commended the "Report on the Grounds for Future Relations Between the Church of Sweden and The Episcopal Church," and called on the Presiding Bishop to explore ways for the relationship with the Church of Sweden to be deepened, and which full communion relationship was formally celebrated during a Eucharist service at Uppsala Cathedral, Sweden in November 2015, a service led by former Episcopal Church Presiding Bishop Katharine Jefferts Schori, at the invitation of Presiding Bishop Michael Curry, and the Church of Sweden Archbishop Antje Jackelén; and be it further

Resolved, That the 79th General Convention request the Presiding Bishop to prepare, in concert with the Church of Sweden, a memorandum of understanding setting forth the terms and procedures of the full communion between The Episcopal Church and the Church of Sweden.

THE EVANGELICAL LUTHERAN CHURCH OF BAVARIA

The discussions between the Evangelische-Lutherische Kirche in Bayern (ELKB) and The Episcopal Church (TEC) began as the result of a meeting in June 2013 between Landesbischof Dr. Bedford-Strohm and Presiding Bishop the Most Rev. Dr. Jefferts-Schori. In their meeting, the two Presiding Bishops expressed the wish and challenge for the two churches to explore the possibility of closer communion, including, if possible, full communion with interchange of ministers and sharing of the sacraments.

A close relationship has existed for over 50 years between Episcopal Church and the ELKB in Munich, especially between the Church of the Ascension in Munich, a parish of the Convocation of Episcopal Churches in Europe, and the Emmauskirche, a parish of the ELKB. Ascension has shared space in the Emmauskirche since 1970. Elsewhere in Bavaria, a similar close TEC-ELKB relationship exists with the Episcopal missions in Nuremberg and Augsburg, who also share space with ELKB parishes.

Conversations between representatives of the ELKB and TEC began in 2013 shortly after the encounter between Presiding Bishops Jefferts-Schori and Bedford-Strohm, and soon took on the characteristics of a dialogue. Meetings in subsequent years took place in New York, Tutzing, Paris, and Augsburg. Numerous smaller meetings took place between in-person meetings.

The conversation/dialogue committee included representatives from TEC, the ELKB, and:
The Director for Unity, Faith and Order of the ***Anglican Communion Office***,
The Director of the Council for Christian Unity of the ***Church of England***,
A representative of ***Inter-Anglican Standing Commission for Unity, Faith and Order***
The Chair of the ***German National Committee of the Lutheran World Federation***,
The Evangelische Kirche in Deutschland (EKD) co-chair of the ***Meissen Commission***, and
The ***Director for Ecumenical and Inter-Religious Relations of the ELCA***.

CURRENT AND FORMER EPISCOPAL PARTICIPANTS IN THE TEC-ELKB CONVERSATION:

The Rt. Rev. Mark D.W. Edington (2019-present)
The Rev. Christopher Easthill (2019-present)
The Ven. Walter Baer (2017-present)
The Rev. Margaret Rose (2013-present) *TEC staff representative*
The Rt. Rev. Pierre W. Whalon (2013-2019)
The Rev. Steven Smith (2013-2019)
Kathryn L. Johnson, PhD (2013-present), Director for Ecumenical and Inter-Religious Relations (ELCA)

Resolution 2018-C059 ***approved and commended the process of exploring deeper relations and the dialogue toward full communion between TEC and the ELKB.***

Based on this **mandate**, the dialogue committee has moved forward in this triennium to develop a proposed agreement of full communion between TEC and the ELKB, found at the conclusion of this Blue Report. The agreement "Sharing the Gifts of Communion: An Agreement of Full Communion between the Evangelical Lutheran Church in Bavaria and The Episcopal Church" is being proposed to the 80th General Convention. The Task Force commends this document for study and possible implementation. Background papers on this dialogue and additions or changes to this proposed agreement, can be downloaded at the Episcopal Church website at: www.episcopalchurch.org/ecumenism.

THE CHURCH OF SWEDEN

In this triennium, the Episcopal Church and the Church of Sweden have continued to live into their full communion relationship, as set forth in Resolutions 2015-A070 and 2018-DO85. Our common work in this triennium was notably in the area of Climate Change (together with the ELCA), and our ongoing commitment to engage the issue of refugee and asylum work. At the ordination and consecration of the Rt. Rev. Mark Edington as Bishop in Charge of the Convocation of Episcopal Churches in Europe, the Archbishop of Uppsala, the Most Rev. Antje Jackelen, was represented by the Rev. Per Gyllenör. Church of Sweden congregations and Episcopal congregations are found together in several European cities including, Paris, Brussels, Rome, Frankfurt and Munich. In recent years, the closest cooperation has existed in Brussels and in Frankfurt.

Work on a memorandum of understanding setting forth the terms and procedures of the full communion between the two churches continues. Due to staffing changes in the ecumenical office of the Church of Sweden and the pandemic, the memorandum cannot be reported out at this time. That work will continue through the next year / triennium.

ADDITIONAL AREAS OF DISCUSSION AND ACTION

Education: It is thought that the depth and breadth of the work done in this area, especially at a denominational level, is unknown by many. There are instances when people are voting without clarity, for example a lack of understanding of the UMC Book of Discipline and the potential ramifications it could have on a formal partnership with TEC. As a result, this Task Force is pursuing and developing ways to offer education and history to members of the House of Bishops and members of the House of Deputies. This is also intended to strengthen ecumenical and interfaith work that is done at the diocesan and local level.

Tool kit for parishes: One outgrowth of the education commitment being considered is the establishment of an online "tool kit" for local ecumenical and interfaith engagement. Consolidating best practices, reference points, and more, will provide a real service to TEC at all levels in a rapidly evolving and global world.

History and Role of the Chicago/Lambeth Quadrilateral: Part of the discussion this triennium has been around the Chicago/Lambeth Quadrilateral, the current rubric for some formalized denominational partnerships at the denominal level. The document has a sound grounding in history and theology; the discussion has revolved around questions of whether or not it is still adequately complete or if other factors need to be at play when considering ventures such as the Call to Common Mission (2001 with ELCA) and the UMC relationship, as well as how we understand the Anglican Communion.

PARTNERS IN WORK

By its definition, this Task Force does not stand alone. To accomplish the mandate of General Convention, the TFCEIW is connected to other parts of TEC engaged in interfaith or ecumenical efforts. The closest relationship is with the TEC Office of Ecumenical and Interfaith Relations. Their work, as well as the breadth and depth of their knowledge, has been a crucial part of this effort.

Other partners include the Office of Global Partnerships throughout the triennium, the Episcopal Church work at the United Nations, the Episcopal Diocesan Ecumenical and Interfaith Officers (EDEIO) group, and the various task forces, committees, and dialogue groups who are engaged in specific relationships, such as the TEC-PCUSA dialogue.

GOALS FOR THE TFCEIW FOR THE NEXT TRIENNIUM

- Propose an updated Jewish-Christian Guidelines statement
- Propose an updated statement on interfaith relations
- Develop and propose a formal statement on the Episcopal Theology of Ecumenism that takes into account the history, practices, and reasons for this engagement
- Create an online resource for local ecumenical and interfaith work
- Further the work of the ecumenical dialogue groups
- Clarify and update current memorandums of understanding and other important, related documents
- Review Title IV applications to clergy from churches in full communion
- Increase the visibility of the work of the Office of Ecumenical and Interfaith Relations

Proposed resolutions

A091 Evangelical Lutheran Church in Bavaria-Episcopal Dialogue

Resolved, the House of _______ concurring, That the 80th General Convention of The Episcopal Church receive and commend *Sharing the Gifts of Communion*, available in the report to the 80th General Convention of the Task Force to Coordinate Ecumenical and Interreligious Work, as the basis for a relationship of full communion to be established between The Episcopal Church and the Evangelische Lutherische Kirche in Bayern (ELKB) (Evangelical Lutheran Church in Bavaria); and be it further

Resolved, that this document be shared widely within the church for discussion and comment, with a view of accepting it as the basis for establishing a relationship of full communion between the two churches when appropriate.

EXPLANATION

The document *Sharing the Gifts of Communion* is available as a supporting document to this resolution. It is also available within the report to the 80th General Convention of the Task Force to Coordinate Ecumenical and Interreligious Work (otherwise known as their "blue book" report). Blue Book reports to the 80th General Convention are available on the blue book page of the General Convention website at https://www.generalconvention.org/bluebook2021.

A092 Churches Beyond Borders

Resolved, the House of _______ concurring, That the 80th General Convention of The Episcopal Church accept the Memorandum of Mutual Recognition of Relations of Full Communion dated September 26, 2018 by and among The Episcopal Church, the Evangelical Lutheran Church in America, the Anglican Church of Canada and the Evangelical Lutheran Church in Canada (which can be found on the Ecumenical and Inter-religious page of The Episcopal Church's website at https://www.episcopalchurch.org/ministries/ecumenical-interreligious/ and which shall be added to the Ecumenical and Interfaith Relationships page of the Archives upon acceptance of the Memorandum by the General Convention https://www.episcopalarchives.org/sceir) the basis for a relationship of full communion to be established among the four churches upon the acceptance of the Memorandum by each of the four churches; and be it further

Resolved, that the 80th General Convention recognizes the Evangelical Lutheran Church in America, the Anglican Church of Canada, and the Evangelical Lutheran Church in Canada have previously accepted the Memorandum through actions of their respective governing bodies; and be it further

Resolved, that the 80th General Convention of The Episcopal Church request that the Most Rev. Michael B. Curry, Presiding Bishop of The Episcopal Church, convey this action to the Presiding Bishops and Primates of the other churches that are a party to the Memorandum; and be it further

Resolved, that the acceptance of the Memorandum shall not affect or alter the current relationship of full communion between The Episcopal Church and the Anglican Church of Canada recognized by Canon I.20.1(a) or the current relationship of full communion between The Episcopal Church and the Evangelical Lutheran Church in America recognized by Canon I.20.2; and be it further

Resolved, that the ecumenical officers of The Episcopal Church, working with the Task Force to Coordinate Ecumenical and Interreligous Work, establish policies and procedures to facilitate exchange of ministry between the Evangelical Lutheran Church in Canada as set forth in the Memorandum; and be it further

Resolved, that Canon I.20.1 be amended by adding a new subsection, as follows:

(d) The Episcopal Church has a relationship of full communion with the Evangelical Lutheran Church of Canada under the terms of the Memorandum of Mutual Recognition of Relations of Full Communion dated September 26, 2018 by and among The Episcopal Church, the Evangelical Lutheran Church in America, the Anglican Church of Canada and the Evangelical Lutheran Church in Canada, which was accepted by the 80th General Convention of The Episcopal Church as Resolution 2021-A___.

EXPLANATION

More information can be found at https://www.episcopalchurch.org/ministries/ecumenical-interreligious/ecumenical-dialogue-partners/

A093 The Episcopal Church-United Methodist Church Dialogue

Resolved, the House of ______ concurring, That this 80th General Convention commends the current version of "A Gift to the World, Co-Laborers for the Healing of Brokenness," which was prepared and distributed by The Episcopal Church-United Methodist Dialogue; and be it further

Resolved, that this Convention encourages all Episcopalians to utilize the many resources available to understand the substance of this dialogue and its goal of full communion. Resources can be found on the websites of The Episcopal Church (episcopalchurch.org), the Episcopal Diocesan Ecumenical and Interreligious Officers (edeio.org), and umc-tec.org, a website supporting full communion between the United Methodist Church and The Episcopal Church; and be it further

Resolved, that this Convention encourages and supports prayerful consideration by all Episcopalians during the coming triennium of this significant step forward in response to our Lord's fervent wish "that all may be one."

A094 Affirm Ongoing Work and Dialogue with Ecumenical Partners

Resolved, the House of ________ concurring, That the 80th General Convention joyfully affirms the continuation of the ecumenical dialogues in which The Episcopal Church is engaged: the Presbyterian Church (USA)-Episcopal Dialogue; the Anglican-Roman Catholic Dialogue (ARCUSA), and the work toward full communion with the United Methodist Church (UMC). And be it further

Resolved, that this Convention joyfully affirms the continuation of work of the dialogue with the Evangelical Lutheran Church in Bavaria (Evangelisch-Lutherische Kirche in Bayern) and commends the document *Sharing the Gifts of Communion* to the church for consideration. And be it further

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

Resolved, that this Convention joyfully affirms our representation and participation in national ecumenical bodies, including the National Council of Churches (NCC), Churches Uniting in Christ (CUIC) and Christian Churches Together (CCT).

EXPLANATION

More information about this work can be found at:

https://www.episcopalchurch.org/ministries/ecumenical-interreligious/ecumenical-dialogue-partners/

Supplemental Materials

Table of contents:

Sharing the Gifts of Communion

An Agreement of Full Communion between the Evangelical Lutheran Church in Bavaria and The Episcopal Church.

Introduction

Since the 1970s, a fruitful partnership has been built up in Bavaria between the Convocation of Episcopal Churches in Europe, part of The Episcopal Church (TEC), and the Evangelical Lutheran Church in Bavaria (Evangelisch-Lutherische Kirche in Bayern; ELKB), which expresses itself in a consistent history of sharing in worship and prayer and working together in diaconal projects.

Through this work together, Episcopalians and Lutherans in Bavaria have come to understand more deeply their shared mission and the bonds between their churches. Building on existing agreements between Anglicans/Episcopalians and Lutherans in Germany, North America and Northern Europe, TEC and the ELKB are now ready to move into a relationship of full communion, enabling full interchangeability of ministries and full participation in one another's mission.

This current agreement, made specifically between TEC and the ELKB, has been informed by a number of previous agreements between Anglican and Lutheran churches:

- the *Meissen Agreement* (1991), between the Church of England and the Evangelical Church in Germany (EKD), achieves mutual recognition of churches and mutual Eucharistic hospitality, but does not achieve full communion or interchangeability of ordained ministries;[1]
  and on the three regional agreements of (full) communion between Anglicans and Lutherans:
- the *Porvoo Common Statement* (1992/93), between the European member churches of the Anglican Communion and most of the Nordic and Baltic Lutheran churches;[2]
- *Called to Common Mission* (1999/2000), between TEC and the Evangelical Lutheran Church in America;[3]
- the *Waterloo Declaration* (2001), between the Anglican Church of Canada and the Evangelical Lutheran Church in Canada.[4]

Through its membership in the Lutheran World Federation (LWF), the ELKB is in communion with the Scandinavian and Nordic Lutheran churches, the ELCA and the Evangelical Lutheran Church in Canada. TEC, the Anglican Church of Canada, and the British and Irish Anglican churches are in communion through their membership of the Anglican Communion. The LWF and the Anglican Communion are also linked through the *Joint Declaration on the Doctrine of Justification* (1999) agreed between the LWF and the Roman Catholic Church, the substance of which was affirmed by the Anglican Communion in 2017.

In many parts of the world, member churches of the LWF and the Anglican Communion work in close cooperation, with or without an agreement, and the Third Anglican Lutheran International Commission urged churches to develop or adopt agreements that reflect this cooperation.[5] In this spirit, this agreement is offered as a further example and invitation to other member churches of the Anglican Communion and the Lutheran World Federation to consider in their contexts how such a move forward could be accomplished.

Relationships between TEC and the ELKB have thus developed within the context of a long history of ecumenical dialogue between Lutheran and Anglican/Episcopal churches, which has shaped and enriched the experiences of many Anglicans and Lutherans. In particular, through *Called to Common Mission*, mutual relationships between the ELCA and TEC have become a lived reality. As distinctive churches with their own particular relationships, in making this current agreement, TEC and the ELKB draw on the extensive network of mutual experience of mission and ministry, as well as the experience of working and worshipping together locally. The purpose of the current agreement is to foster and deepen that common work through recognizing a relationship of full communion between TEC and the ELKB.

TEC and the ELKB have already taken important steps towards full communion. The 1987 *Niagara Report* of the Anglican-Lutheran International Continuation Committee and *Receiving One Another's Ordained Ministries* of the Inter-Anglican Standing Commission on Unity, Faith and Order (received by ACC-16, 2016), define stages of relations between churches. Relationships between the TEC and the ELKB have long-since reached stage 1 (recognition of one another as churches) and stage 2 (provisional structures exist which promote mutual growth). The intention in this agreement is to move to stage 3, the exploration of particular practices with respect to *episkopé* which will enable the full interchangeability of ministries, and stage 4, the public declaration and celebration of full communion.

In moving into this relationship, TEC and the ELKB understand full communion to be a relation between distinct churches in which each recognizes the other as a catholic and apostolic church holding the essentials of the Christian faith. Within this new relation, churches become interdependent while remaining autonomous. Full communion includes the establishment of appropriate recognized organs of regular consultation and communication, including episcopal collegiality, to express and strengthen the fellowship and enable common witness, life, and service. Diversity is preserved, but this diversity does not divide and is not static. Neither church seeks to remake the other in its own image, but each is open to the gifts of the other as it seeks to be faithful to Christ and his mission. They are together committed to a visible unity in the church's mission to proclaim the gospel and administer the sacraments.[6]

Specifically, TEC and the ELKB understand this to include welcoming one another's members to receive sacramental and other pastoral ministrations; mutual recognition and interchangeability of ordained ministries; freedom to use one another's liturgies; mutual invitations to participate liturgically in one another's ordinations and installations of clergy, including bishops; and the development of suitable structures for consultation to express, strengthen, and enable common life, witness, and service, to the glory of God and the salvation of the world.[7]

Such a relationship is based on:

- a common confession of the apostolic faith in word and life;
- the sharing of one baptism, the celebration of one eucharist and the service of a reconciled, common ministry;
- bonds of communion which support the churches at every level to guard and interpret the apostolic faith, to teach authoritatively, to share resources, and to bear effective witness in the world.[8]

Signs of Communion that already exist

Lutherans and Anglicans recognize that they already share communion in the Triune God through their acceptance of the common gift of the Holy Scriptures; their affirmation of the sacraments of baptism and the eucharist as constituent for the church; their shared affirmation of the Apostles' and Nicene creeds; their shared traditions of worship, spirituality and theology; and their distinct but related experiences of the Reformation.

Anglicans and Lutherans both recognize Christ's church as "the assembly of all believers among whom the gospel is taught purely, and the sacraments are rightly administered".[9] Anglicans and Lutherans hold the ordained ministry of Word and sacrament to be a gift of God to the church, and recognize the necessity of structures of pastoral oversight and authority.

Anglicans and Lutherans have never condemned one another as churches. TEC and the ELKB now affirm that they recognize in one another the essentials of the one catholic and apostolic faith, to which their statements of faith witness, including the *Augsburg Confession*, Luther's *Small Catechism*, and TEC's *Book of Common Prayer* (1979), and they affirm the substance of the doctrinal consensus articulated by successive international Anglican-Lutheran dialogues.

TEC and the ELKB affirm the cooperation between Episcopalians and Lutherans in Bavaria, including the mutual invitation to receive communion, to share services and joint diaconal work. In the absence of a formal agreement, the provisions of the Meissen Agreement pertaining to ministry and worship have tacitly been taken to apply for TEC and the ELKB in this local context.

Ministry and oversight

The key question for this ecumenical relationship has been that of the theology of ordained ministry, and in particular that of episcopal ministry and its relation to succession. This agreement welcomes the consensus reached on this question through the *Porvoo Common Statement*, *Called to Common Mission*, and the *Waterloo Declaration* and affirms the theological contribution made by those agreements in moving towards a shared understanding. This agreement draws on those earlier agreements, as well as on further reflection specific to the relationship between TEC and the ELKB, to apply the consensus already reached to the specific situation in Bavaria, and thus to the German context.

Together with the *Porvoo Common Statement*, TEC and the ELKB affirm that "the primary manifestation of apostolic succession is to be found in the apostolic tradition of the Church as a whole. The succession is an expression of the permanence and, therefore, of the continuity of Christ's own mission in which the Church participates."[10]

Together with *Called to Common Mission*, TEC and the ELKB "acknowledge that one another's ordained ministries are and have been given by God to be instruments of God's grace in the service of God's people, and possess not only the inward call of the Spirit, but also Christ's commission through his body, the church." They agree that "ordained ministers are called and set apart for the one ministry of Word and Sacrament, and that they do not cease thereby to share in the priesthood of all believers", and that these ministers "fulfill their particular ministries within the community of the faithful and not apart from it." They recognize that "the priesthood of all believers affirms the need for ordained ministry, while at the same time setting ministry in proper relationship to the laity."[11]

Together with *Called to Common Mission*, TEC and the ELKB also affirm that "personal, collegial, and communal oversight is embodied and exercised in both […] churches in a diversity of forms, in fidelity to the teaching and mission of the apostles."[12] Together with the LWF's 2007 Statement *Episcopal Ministry within the Apostolicity of the Church*, TEC and the ELKB affirm that in both churches, "Bishops are called to a special role of oversight in the church, but the wider community also is called to participate in oversight and to judge the way in which episcopal ministry is being carried out."[13] They acknowledge also that in some other churches of the LWF, and also some other churches of the EKD, those who exercise such "special role of oversight" are not referred to as bishop, but rather, for instance, as Church President or Präses, similarly a Regional Bishop may be known as *Landessuperintendent* or *Oberkirchenrat*.[14] TEC and the ELKB also recognize that this ministry of oversight – *episkopé* – is exercised not only through bishops but also through the synods and other leadership structures of the two churches, and that the relationship between bishops and these structures is an important aspect of the ministry of oversight in both churches.[15]

Together with *Called to Common Mission*, TEC and the ELKB agree that the historic episcopate "can be locally adapted and reformed in the service of the gospel."[16] Since the sixteenth century, the traditions from which both churches emerged have experienced both continuity and change in their structures of *episkopé*. Different practices of oversight developed in local contexts in response to diverse ecclesiological and political realities and theological understandings. Anglicans maintained episcopal-diocesan structures and continued to use the term "bishop" to describe these ministries after the Reformation. Lutherans in Germany provided *episkopé* by adapting existing structures, and described these ministries using a variety of terms, including "superintendent", the preferred translation of the New Testament term *episkopos*.

The establishment of Anglican parishes on the North American continent spread steadily following the first recorded Anglican celebration of Holy Communion in North America in 1607 in Jamestown, Virginia. Prior to the American Revolution, representatives of the Bishop of London known as commissaries provided oversight in some colonies. In the context of American Independence from Great Britain, the first American bishops were elected, and in 1789 The Episcopal Church was constituted as a separate ecclesiastical jurisdiction and as a church independent of state authority. From this time TEC has affirmed the importance of synodical government and bishops have been elected. The structures established in 1789 continue to the present.

General Convention, made up of the House of Bishops and the House of Deputies (equal numbers of elected clergy and lay people), sets the policy of the Episcopal Church. Its bishops are democratically elected by their respective diocesan conventions or synods and are answerable to the House of Bishops; they are to be servants of the church and not its lords. The Presiding Bishop of the Episcopal Church is a member of the House of Bishops, who since 1928 has been elected by that House, with confirmation by the House of Deputies. A similar structure is mirrored in the dioceses, which have diocesan conventions (made up of the diocesan clergy and elected lay delegates), that work closely with the bishop. A bishop is elected at the diocesan convention by the clergy and lay delegates and is consecrated only after confirmation of this election by a majority of TEC's diocesan bishops and diocesan standing committees representing the whole church. At the consecration, bishops are consecrated through prayer and laying on of hands by at least three bishops, usually including bishops of the ELCA and other full communion partners, with the involvement of representatives of the diocese, both priests and lay persons, especially in presenting the bishop-elect for consecration, and in the liturgy.

The Evangelical Lutheran Church in Bavaria was formed in 1808 after the foundation of the Kingdom of Bavaria in 1806. The General Synod was established in 1848, initially sharing responsibility with the ruling (Roman-Catholic) Bavarian monarch who acted as "*summus episcopus*", in direct continuity with the role of the late medieval German prince bishops.[17] After the fall of the Bavarian monarchy in 1918, the ELKB (*Landeskirche*) was constituted, with a church president (*Kirchenpräsident*), who since 1933 has been referred to as bishop (*Landesbischof*). The bishop works together with the Synod (*Landessynode*, made up of two-thirds lay people and one third clergy) and its Executive Committee (*Landessynodalausschuss*), and also chairs the Church Governing Board (*Landeskirchenrat*), which is responsible for the day-to-day running of the church. Oversight is exercised through these four church-governing bodies. The *Landessynode* elects the *Landesbischof*. Regional bishops (*Regionalbischöfe*) or *Oberkirchenräte*, who are members of the *Landeskirchenrat*, share the responsibility for oversight in their episcopal areas or areas of responsibility through ordination and visitation.

Today, pastors of the Evangelical Lutheran Church in Bavaria are ordained by the *Landesbischof* or regional bishops. Ordination is a onetime act. Central elements of the liturgy are the prayer for the Holy Spirit, the laying on of hands and the blessing of the ordinand. The ordination rite provides that assistants say a biblical word of blessing and also lay on hands. These assistants are not restricted to the ordained and may include (for instance) members of the parish council (vestry) or the candidate's family and friends. The installation of a bishop is understood as the installation of an already ordained pastor into a new office now with episcopal functions. The *Landesbischof* is installed by the presiding bishop of the Evangelical Lutheran Church of Germany; the regional bishops are installed by the *Landesbischof*. It is good practice – but not strictly necessary – that at such installations bishops or ministers exercising *episkopé* in sister churches within the Lutheran World Federation or other denominations are present and assist in the laying on of hands.

In both TEC and the ELKB, these ministries of *episkopé* are therefore exercised personally, collegially and communally.[18] Bishops share the exercise of *episkopé* with the synodical structures of the church. Ministers exercising *episkopé* constitute "a supra-congregational form of ordained ministry for the sake of spiritual discernment and leadership."[19] In both churches, clergy are ordained only by ministers who exercise *episkopé*: the diocesan bishop or *Landesbischof*, suffragan or regional bishops.

Together with the LWF's Lund Statement, *Episcopal Ministry within the Apostolicity of the Church* , TEC and the ELKB affirm that these forms of *episkopé* are intended to preserve the apostolic nature of the church and to interpret it for today. Through these structures of *episkopé*, the church "exercises responsibility for its doctrine and practices through open, critical deliberation and transparent ecclesial processes."[20]

TEC and the ELKB affirm also with the *Lund Statement* that a bishop not do so doeshis/herin isolation: "together with teachers of theology, pastors in congregations, persons called to a ministry of education and committed lay persons, episcopal ministers [i.e. ministers exercising *episkopé* – ed.] are especially called to judge doctrine in the life of the church, and to reject teaching that is contradictory to the gospel. The responsibility of governing bodies in the church (parish councils and church synods) is also to take formal decisions to ensure that the institutional, practical life of the church is in good keeping with the message of the gospel and witnesses to it."[21]

In the words of the Anglican Bishops' *Appeal to All Christian People* (1920), TEC and the ELKB affirm that both churches have maintained and been served by an ordained ministry truly faithful to the gospel, and that the ordained ministries of both churches have always been, and continue to be, "manifestly blessed and owned by the Holy Spirit as effective means of grace".[22]

The four articles of the Anglican *Chicago-Lambeth Quadrilateral* (1888) remain the foundation for Anglican/Episcopal ecumenical relations. Anglicans and Lutherans have long agreed on its first three articles which affirm the foundational nature of Holy Scripture, the sacraments of baptism and the Eucharist, and the Apostles' and Nicene Creeds. The Quadrilateral sets out as the fourth basis for church unity: "the historic episcopate, locally adapted in the methods of its administration to the varying needs of the nations and peoples called of God into the unity of [God's] Church."[23] TEC and the ELKB affirm that in both churches, *episkopé* is exercised in a form that is congruent with this article.

With the *Meissen Agreement*, TEC and the ELKB "acknowledge that personal and collegial oversight (episkopé) is embodied and exercised in [their] churches in a variety of forms, episcopal and non-episcopal, as a visible sign of the Church's unity and continuity in apostolic life, mission and ministry."[24] However, the ELKB and TEC can go further than the Meissen

Agreement: on the basis of the congruence in their understanding and practice of *episkopé* and synodical government TEC and the ELKB are able to enter into a relationship of full communion, with interchangeability of ordained ministries.

Continuity in the Gospel: Historic and evangelical succession

For both TEC and the ELKB, continuity in the proclamation of the gospel is of primary importance in establishing the apostolic character of the Church. This is preserved through “succession” However, the focus of the term “succession” is different in the traditions of the two churches.

Within TEC succession is understood as the orderly succession of bishops ordained by their predecessors as integral to the preservation of apostolic continuity in the proclamation of the gospel. This represents an episcopal tradition which can be traced to the ancient church, in which bishops already in this succession maintain the integrity of the faith by ordaining newly elected bishops with prayer and the laying on of hands.[25] TEC, like all the churches of the Anglican Communion, asserts that its bishops stand in historic succession understood in this way, through the consecration of new bishops through prayer and laying on of hands by at least three existing bishops. Acknowledging this background, Anglicans have still recognized in their previous agreements of (full) communion that the apostolic faith is preserved, not exclusively through the succession of bishops, but by the whole church, that is, also through the ministry of priests and deacons and of the whole people of God.

The ELKB understands succession in terms of the continuity of this apostolic faith, rooted in the proclamation of the gospel and supported by the ordained ministry. As expressed in the Augsburg Confession (art. 7), the Reformation emphasized the church as evangelical, established through the continuous preaching of the gospel and the celebration of the sacraments. This is the basis of the apostolic succession. The Augsburg Confession (art. 14) teaches that “no one should publicly teach in the Church or administer the Sacraments unless properly called.” Commenting on this, Article 14 of the *Apology* (1531) affirms the Lutheran commitment to “willingly retain ecclesiastical and canonical order”. Luther and other Reformers worked to ensure that structures were put in place to maintain the true preaching of the gospel and celebration of the sacraments. These structures have always included forms of oversight such as superintendents and visitations. Through and since the Reformation, this continuity in local structures has therefore been associated with a conscious conviction that apostolic teaching and faith must be not only rediscovered but also preserved. Those involved in oversight are installed through prayer and the laying on of hands.

Both TEC and the ELKB therefore recognize, as affirmed by *Called to Common Mission*, that in the context of the ordained ministry and the ministry of the whole people of God both churches “value and maintain a ministry of *episkopé* as one of the ways … in which the apostolic succession of the church is visibly expressed and personally symbolized in fidelity to the gospel through the ages.”[26]

In moving forward together, TEC and the ELKB commit to share an episcopal succession that is both evangelical (true to the gospel) and historic (true to tradition), including regularly a bishop of the other church to participate with at least two other ministers exercising *episkopé* in the laying on of hands at the ordinations/installations of their own bishops as a sign of the unity and apostolic continuity of the whole church.[27] TEC and the ELKB believe that the fullness of the apostolic tradition preserved in each church will deepen as a result of the relationship of full communion, through the shared ministry of bishops and presbyters and of the whole people of God.

TEC and the ELKB share congruent understandings of *episkopé*, but this does not commit the two churches to a unified concept of the office of bishop. TEC and the ELKB acknowledge that there is a diversity of how the office of bishops is lived out in each church. TEC and the ELKB affirm that the fact that the liturgy of introducing bishops into office can be understood as installation or as ordination, or that tenure in office may vary, or that the status of bishops when they leave office may differ does not hinder us entering into full communion.

In order to demonstrate more clearly the shared nature of the *episkopé* exercised by bishops, both churches commit to ensuring that at the ordination/installation of bishops, the whole church be visibly present through the involvement of lay people as assistants in the ordination/installation and to working to include in their installation/ordination rites an affirmation that the bishop will exercise *episkopé* in conjunction with the synodical government of the church.

Each church remains free to explore its particular interpretation of the ministry of bishops in evangelical and historic succession. This should be done in consultation with one another. Each church maintains and can enter into relationships with other churches, including relationships of (full) communion, which do not oblige the other church to engage in that relationship. That is, this declaration of full communion does not imply automatic communion of the one church with the communion partners of the other church, although each church is encouraged to seek communion with the churches with which the other is in communion.

Recognizing one another as churches that truly preach the gospel and duly administer the holy sacraments,[28] TEC and the ELKB receive with thanksgiving the gift of unity which is already given in Christ. Christians have repeatedly echoed the scriptural confession that the unity of the church is both Christ's own work and his call to all Christians. It is the task of the churches, and of all Christians, as well as Christ’s gift. Every Christian – and every church – must “make every effort to maintain the unity of the Spirit in the bond of peace” (Ephesians 4:3), praying that they may rely upon, and willingly receive from one another, the gifts given by Christ through his Spirit “for building up the body of Christ” in love (Ephesians 4:16).

As TEC and the ELKB, we do not know to what new, recovered, or continuing tasks of mission this relationship of full communion will lead our churches, but we give thanks to God for leading us to this point, and entrust ourselves to that leading in the future, confident that our full communion will be a witness to the gift and goal already present in Christ, “so that God may be all in all” (1 Corinthians 15:28).

Actions and Commitments

We, The Episcopal Church and the Evangelical Lutheran Church in Bavaria, declare ourselves to be in full communion. Together,

a. We commit ourselves to continue and deepen our common life in mission and service, to pray for and with one another and to share resources as appropriate in Bavaria, recognizing that TEC is a very small minority there. We encourage regular collaboration and consultation among members of our churches at all levels as appropriate.

b. We commit ourselves to offer sacramental and pastoral ministry to members of one another's churches.

c. We commit ourselves to receive those who formally leave one church to move to the other with the same status (for example baptized, communicant, confirmed) that they held in their previous church.

The declaration of full communion between our two churches implies the immediate recognition of currently serving ministers of the one church by the other. TEC fully recognizes the ordained ministry of bishops and pastors currently existing within the ELKB, acknowledging its pastors as ordained ministers in the Church of God and its bishops and regional bishops as bishops exercising a ministry of personal *episkopé*. Likewise, the ELKB fully recognizes the ordained ministry of bishops and priests currently existing within TEC, acknowledging its priests as ordained ministers in the Church of God and its bishops as bishops exercising a ministry of personal *episkopé*.[29]

With full communion, interchangeability of ministries is given. We therefore commit ourselves to welcome persons ordained in either of our churches to the office of priest/pastor to serve, by invitation and in accordance with any regulations which are in force, in that ministry in the receiving church without re-ordination. We affirm that bishops may be invited to carry out in the other church, as appropriate, those ministries which they exercise in their own, such as confirmation.

We commit ourselves, as a sign of the unity and continuity of the Church, to invite one another's bishops regularly to participate in the laying on of hands at the installation/ordination of bishops, with the expectation that a bishop from the other church will be present at the ordination of the bishop of the Convocation and the installation of the *Landesbischof*;

one another's pastors and priests to participate in the laying on of hands at the ordination of pastors or priests in one another's churches;

one another's lay people, including both those who share in the exercise of *episkopé* and members of local congregations, to participate in our churches' ordinations/installations in ways which celebrate the ministry of the whole people of God.

Such mutual invitations are understood as a call for the deepening of the lived experience of our communion.

We commit ourselves also to continue our practice of inviting representatives of other churches, representing the worldwide church, to participate at the installation/ordination of bishops.

We commit ourselves to ensure that at the ordination/installation of bishops, the whole church be visibly present through the involvement of lay people as assistants in the ordination/installation and to work to include in our installation/ordination rites an affirmation that the bishop will exercise episkopé in conjunction with the synodical government of the church.

We commit ourselves to invite a representative of TEC to attend the synod of the ELKB and a representative of the ELKB to attend the Convention of the Convocation of the Episcopal Churches in Europe, and to keep one another informed about developments in our two churches.

We commit ourselves to establishing a small continuation committee which for at least seven years will undertake regular (at least annual) consultation regarding our relationship, will initiate further work as needed, and can be consulted should any questions or difficulties arise.

Each church agrees that the other church will continue its full communion relationship with all the churches with whom it is already in communion. We encourage one another to seek communion with these churches as well, but recognize that our declaration of full communion does not imply automatic communion of the one church with the communion partners of the other church.

We commit ourselves to work together to proclaim Christ's gospel through word and deed, and to further the unity of the whole of Christ's church, recognizing that entering a relationship of full communion will bring new opportunities and levels of shared evangelism, witness, and service.

Revised November 9, 2020

End Notes

[1] The ELKB is a party to the Meissen Agreement through the EKD.

[2] Neither the ELKB nor TEC is a party to the *Porvoo Common Statement*. The signatories of the *Porvoo Common Statement* are, from the LWF: the Evangelical Lutheran Church of Denmark, the Estonian Evangelical Lutheran Church, the Evangelical Lutheran Church of Finland, the Lutheran Church in Great Britain, the Church of Iceland, Evangelical Lutheran Church of Latvia Abroad, the Evangelical Lutheran Church of Lithuania, the Church of Norway, the Church of Sweden; and from the Anglican Communion: the Church of England, the Church of Ireland, the Lusitanian Church of Portugal, the Scottish Episcopal Church, the Reformed Episcopal Church of Spain, and the Church in Wales. The Evangelical Lutheran Church of Latvia has observer status, which is intended to lead to membership. The United Evangelical Lutheran Church of Germany (VELKD), of which ELKB is a part, has the less binding guest status.

[3] TEC is one of the signatory churches of *Called to Common Mission*.

[4] Neither the ELKB nor TEC is a party to the *Waterloo Declaration*, but the *Memorandum of Mutual Recognition of Relations of Full Communion* will link the *Waterloo Declaration* and *Called to Common Mission*.

[5] *Jerusalem Report*, pp. 53.56 [Appendix 3].

[6] This paragraph adapted from *Called to Common Mission*, §2.

[7] This paragraph is adapted from the *Waterloo Declaratio*n, §7, and the *Porvoo Common Statement*, §58(b).

[8] These points are based on the headings of the *Meissen Agreement*, §8.

[9] Augsburg Confession, art. 7, translation of the Latin text in Robert Kolb/Timothy Wengert, *The Book of Concord*, 43. Compare also the Thirty-Nine Articles, art. 19.

[10] *Porvoo Common Statement*, §39.

[11] *Called to Common Mission*, §7.

[12] *Called to Common Mission*, §7. The terminology “personal, collegial, and communal” is drawn from the discussion of ministry in *Baptism – Eucharist – Ministry* (WCC Faith and Order Paper 111; 1982), §26.

[13] *Episcopal Ministry within the Apostolicity of the Church* (The *Lund Statement*), § 50.

[14] The *Lund Statement* summarizes these roles as “episcopal ministers”; to avoid confusion, this present statement refers to “ministers exercising *episkopé*”.

[15] *Called to Common Mission*, §7.

[16] *Called to Common Mission*, §24.

[17] This concept of church government was known as the *Landesherrliches Kirchenregiment*.

[18] See *Baptism – Eucharist – Ministry*, §26.

[19] *Lund Statement*, §4.

[20] *Lund Statement*, §52.

[21] *Lund Statement*. §52.

[22] Lambeth Conference 1920, Resolution 9.vii.

[23] Lambeth Conference 188, Resolution 11.d.

[24] *Meissen Agreement* §VI 17 A iii.

[25] This definition is found in Called to Common Mission, §11.

[26] *Called to Common Mission*, §12.

[27] *Called to Common Mission*, §12.

[28] CA VII; 39 Articles Art. XIX.

[29] Deacons are not explicitly mentioned in this agreement. The *Jerusalem Report* of the Third Anglican Lutheran International Commission concluded that the church's expression of its diaconal character is context specific, so that different understandings of and practices with relation to the diaconate are to be expected and are therefore not communion dividing.

TASK FORCE TO DEVELOP CHURCHWIDE FAMILY LEAVE POLICIES

Membership

The Rev. Devon Anderson, *Chair*	Minnesota, VI	2021
The Rt. Rev. Daniel Gutiérrez, *Vice-Chair*	Pennsylvania, III	2021
Ms. Sarah Ambrogi	New Hampshire, I	2021
Ms. Barbara Creed	El Camino Real, VIII	2021
The Rev. Canon Alex Dyer	Colorado, VI	2021
Ms. Michael Funston	Kansas, VII	2021
Ms. Kathryn Glover	Maryland, III	2021
The Rt. Rev. Santosh Marray	Easton, III	2021
Ms. Diane Pollard	New York, II	2021
Br. Scott-Michael Pomerenk, BSG	Colorado, VI	2021
The Rev. Lauren Schoeck	Idaho, VIII	2021
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Mandate

2018-C019 Church-Wide Paid Family Leave Policy

Resolved, the House of Deputies concurring, That the 79th General Convention call upon the Presiding Bishop and President of the House of Deputies to appoint a task force consisting of three (3) bishops, three (3) presbyters or deacons, and six (6) lay persons, who represent the diversity of the Church and having among them applicable human resources policy administration, childbirth, adoption, and care of ill family member experience, either personal or professional, to research and create, in consultation with the Church Pension Group, a proposal for a church-wide paid family leave policy for consideration at the 80th General Convention.

Summary of Work

Executive Summary

Generous and equitable family leave creates both time and space for the nurture and formation of children and families and the care of a sick family member. It is, in all simplicity, a justice issue. On some level, the Episcopal Church (TEC) knows and understands the place family leave holds in the incarnational theology that is the core of our Anglican identity. It understands and affirms that family leave is a justice issue that holds moral and ethical implications for our worshipping communities. We know this because over the past 35 years, starting in 1985, General Convention has entertained six separate resolutions concerning, and advocating for, family leave. None of the resolutions, however, have been successful in establishing a mandatory paid family leave benefit for clergy and lay professionals in the church. The first priority of the Task Force to Develop a Mandatory Paid Family Leave Policy (TFPFL) was to figure out why.

The TFPFL's process was careful, intentional, and steady. We spent the first year of the triennium researching every possible aspect of family leave. After exhaustive inquiry, TFPFL came to collectively understand why, after 35 years, TEC still does not have mandatory paid family leave for clergy and lay professionals. Through our research it became clear that without: a federal law mandating paid leave for all states; options for any available insurance products; financial and administrative resources for many dioceses and most congregations to bear the weight alone and administer a family leave program by themselves – the TFPFL would not be able to fulfill entirely the mandate to come back to the 80th General Convention with a comprehensive, mandatory, paid family leave policy for TEC.

The Task Force opted instead for incremental progress, moving our church closer to achieving the ultimate goal of mandatory, paid family leave for all clergy and lay professionals in three ways:

- Providing detailed, accurate, and exhaustive research so that TEC need not form additional task forces to study this issue;
- Writing and successfully navigating a resolution through Executive Council enabling the Office of Governmental Affairs to advocate for a federal mandatory, paid family leave law; and
- Developing model plan designs for paid family leave, with three levels of 12 policy variables (such as eligibility, duration, qualifications, reasons for leave, etc.) that assume parity between clergy and laity, to serve as a resource for dioceses and congregations who elect to offer this benefit, and as a comprehensive template for insurance products in the (hopefully near) future.

The TFPFL is indebted to the Church Pension Group for supporting our work in multiple ways, including securing a trusted consultant to work alongside us in developing the family leave model plan designs. With gratitude, we honor CPG for its enduring patience and gentle guidance throughout the triennium.

Summary of Work

The TFPFL first convened in an online meeting on March 5, 2019, and over the triennium met 14 times, including a two-day meeting which was to have been in person but, due to COVID, happened online. We began our work by sharing our perspectives, experiences, passion, and opinions about the task ahead: to spend a triennium developing a mandatory, paid family leave policy for the Episcopal Church. Recounting our own stories as well as those of friends, family, and church colleagues, it became clear that our intent was to honor all families who make up our church in a very practical, tangible way by financially providing for them while they take time to care for a new family member in his/her/their first weeks and months of life, the oldest family members in their final weeks of life, and those in between.

The TFPFL recognized family leave as a multi-layered, complex, intricate issue and spent the first year of its work researching every possible aspect and nuance. First, we consulted widely with advocacy groups, municipal and commercial benefits brokers, insurance companies, religious organizations with family leave policies, including:

- Cigna (industry Power Point: "Family Leave: What Every Employer Should Think About")
- National Partnership for Women and Families ("Fact Sheet," "State Paid FML Insurance Laws," "Paid FML: An Overview")
- The Center for Integrity in Business & The Center for Public Justice ("Family-Supportive Practices in the Sacred Sector")
- Commission on Social Action of Reform Judaism
- The Church of Jesus Christ of Latter-Day Saints
- Anglican Church of Canada, employee handbooks of dioceses with family leave policies

Next TFPFL met in-person/virtually with consultants, advocates, and industry leaders, including:

- Vicki Shabo, Senior Fellow, Paid Lead Policy & Strategy, Better Life Lab, New America
- Rebecca Linder Blachly, Director, Office of Government Relations, The Episcopal Church
- Laura Russell, Citywide Director, New York Legal Aid Society
- The Executive Council's Committee on Governance and Operations
- Church Pension Group (Clayton Crawley, John Servais)
- Terry Smith, First Vice President, American Benefits Consulting

The TFPFL also reached internally, into the Episcopal Church, for a fuller picture of existing family leave practices and policies, including:

- A poll of young parents within TEC to collect stories, narratives, and experiences of sufficient family leave (or lack thereof) for clergy and lay professionals;
- An informal poll of dioceses within TEC that have any form of family leave policy;
- A survey of 5 Episcopal Seminaries and their family leave policies (if applicable);
- Conversation with TEC dioceses not in the United States; and
- A comprehensive research project to map out the history of family leave resolutions at General Convention (initiatives, debate, reports, and outcomes).

Finally, an informal poll was conducted to discern forms of paid family leave offered in TEC dioceses located outside the United States, primarily dioceses in Province 9 and Cuba. This investigation revealed that each of these dioceses has a limited program specific to their own needs. In cases where some limited benefit exists, it is focused specifically on maternity/paternity leave --coverage that is mandated by the local government. Where these benefits are accessible, whether paid and/or time off for family care, it is comparable to, or better than, many states or diocesan jurisdictions within the United States. Our research uncovered two critical findings: (1) There is a wide disparity of benefits and programs within the United States and within Province 9. The benefits also contrast to those provided by the Convocation of Episcopal Churches in Europe; and (2) Coverage is essential for all parents, as it was identified by those interviewed as necessary and demonstrative of our call to care for one another.

All reports, survey and poll results, and interview transcripts can be made available to the relevant legislative committee and/or any bishop or deputy of the 80th General Convention upon request.

At the end of our first year, we possessed a deeper, more mature appreciation of the complexity and complication of family leave policies. Mid-triennium, the TFPLF took a breath and assessed our path forward. From our research we faced what we felt were insurmountable barriers to developing a TEC mandatory, paid family leave policy, for the following reasons:

- There is no current federal law mandating paid family leave across the board; benefits are available only on a state-by-state basis; as of November 2020, only 8 states have mandatory paid family leave laws.
- There are currently no insurance products available in the marketplace for family leave, so employers must bear the full risk of the cost of these programs.
- Paid family leave programs can be extremely and prohibitively costly for an employer such as a church or a diocese.
- Paid family leave programs are administratively complex, especially for employers like TEC where no centralized payroll or Human Resources systems exist. Administrative necessities for family leave policies include: policy development and maintenance, manager training, education and plan roll-out, and record keeping.

Given these challenges, the TFPFL changed course. After consulting with our Presiding Officers, we shifted our strategic focus to bringing about incremental change, meaning helping TEC move closer toward the ultimate goal of mandatory, paid family leave for all clergy and lay professionals. The decision was not made lightly, and we dealt with our collective disappointment in not being able to fully deliver what the 79th General Convention had asked us to do. We understand, and heartily agree with, the church's passionate desire for family leave for all of the equity, justice, theological, moral, ethical, and spiritual reasons. Simply, it's the right thing to do. And the church needs it. The Task Force just could not find a way to overcome the barriers – all the challenges that would have to be overcome in order for any viable resolution to make its way out of legislative committee and onto the floors of the House of Deputies and House of Bishops for consideration, debate, and vote. In mid-triennium, we found ourselves exactly where past interim bodies and General Convention legislative committees had stalled themselves.

In the name of incremental, steady change toward the ultimate goal, the TFPFL took on two initiatives:

- An enabling resolution to equip the Office of Governmental Relations to be able to advocate for national mandatory, paid family leave legislation (several bills have been introduced in Congress); and
- In-depth model plan designs for family leave policies – for permissive, not mandatory, use at the diocesan level, and as a complete template that can be provided to insurance companies as a directive to what TEC wants and needs when products begin to be developed.

On February 14, 2020, the Executive Council approved the following resolution (MW019):

> *Resolved*, That the Executive Council, meeting in Salt Lake City from February 13-15, 2020, affirms the teaching that the birth or adoption of a child is a cause of celebration for parents, family and the entire community and that an entire community has responsibility for supporting a family in raising a child; and be it further
>
> *Resolved*, That we recognize the federal government has a responsibility to establish minimum standards of living for all people, including access to food, housing, and healthcare; and be it further
>
> *Resolved*, That we call on the federal government to establish and provide a funding mechanism for new parents to take parental leave to care for their child, recognizing the benefits to the child, parents, and community; and be it further
>
> *Resolved*, That we call on the Office of Government Relations to advocate to the Congress for the establishment of a paid family leave program, in particular for workers who do not have access to paid leave from their employers.

The TFPFL recommends, as well, that General Convention consider and approve resolution A003 Uniform Paid Family Leave Policy, which is included in this report.

In May 2020, the TFPFL contracted with Terry Smith, a consultant with American Benefits Consulting, to work with a subgroup of the Task Force to develop multi-tiered, model plan designs for family leave. Smith was referred to the TFPFL by the Church Pension Group and is a trusted, reliable guide with whom CPG has worked for years. Again, we are grateful to CPG for helping locate the consultant and bear some of the cost. Once again, CPG proved itself to be an invaluable and faithful partner in our mission. Over the summer months, the team developed bronze, silver, and gold model plans for family leave, designing a "matrix" of 12 mix-and-match plan provisions. Additionally, the model plan identifies a series of "decision points" that any diocese or congregation hoping to use the matrix to design a plan for itself would need to grapple with, including cost burden, parity between clergy and lay professionals, cost analysis, and administration considerations.

During the development of the model the Task Force spent considerable time exploring and discussing the benefits of a centralized payroll system within TEC for administering programs such as family leave. In the end, we decided not to take on this initiative as we felt it went beyond the scope of our enabling resolution.

And finally, a word about terminology. The TFPFL's enabling resolution specified our work and focus on family leave, as opposed to family and medical leave, or parental leave. The term "family leave" is more expansive than "parental" leave in that it encompasses the care and nurture of a child at the time of birth or adoption, as well as caring for a family member for whom the individual is the primary caregiver – whether partner, spouse, child, sibling, parent, grandparent, etc. when the physical or mental health of the family member is such that they are no longer able to care for their basic daily needs (feeding, bathing, dressing themselves) but must rely on another person(s) to provide that care. Family leave is different from medical leave in that paid medical leave indicates leave for self-care during your own serious illness. Paid medical leave has been available for decades in five states.

A glossary of terms is available to the relevant legislative committee and/or any bishop or deputy of the 80th General Convention upon request.

Theological Rationale

Our call and imperative, as followers of Jesus Christ, is to ground the decisions and choices we make for the church in our common theology. The incarnation lives at the core of Anglican identity and theology. The word incarnation means "enfleshment," rooted in the Latin "carnis," meaning "flesh." Jesus was fully human and fully divine, the Son of God in the flesh. From our earliest formations, the Christian church has professed incarnation, Jesus as "truly God and truly man…in two natures, without confusion, without change, without division, without separation…" according to the Council of Chalcedon in 451 (Book of Common Prayer, p.864). What the incarnation means for us today is this: through Jesus, God is revealed to us in the physical and temporal things of everyday life. Through Jesus' earthly life, teaching, and sacrificial love, we come to see God in our own earthly lives, in the quotidian circumstances of human interaction, relationship, challenge, heartbreak, conflict, and joy. The gift of paid family leave – the chance to care for an infant or child new to the family, the opportunity to care for a sick family member, the ability to step away from one's professional occupation in order to minister to the needs of loved ones without loss of income or security – is rooted in our incarnational theology. Through it we have the chance to focus entirely on the nurture of relationships, to discover God anew in the space between people, and live more fully into Jesus' commandments to love one another.

One of the seven components of the Episcopal Branch of the Jesus Movement's Way of Love is "rest." While no one ever will describe family leave to care for a new child or infant to the family or nurse a sick family member as a vacation or a long period of rest, family leave does afford individuals the opportunity to leave behind, for a time, the concerns, anxieties, and deadlines of their paid work to focus that energy on the care of family. This time creates the possibility that the family, in whatever its precise circumstance, can enjoy the fullness of time together in all its parts – work and rest, worship and prayer, blessing and forgiveness. Family leave creates space in time. In his seminal book, "The Sabbath," Abraham Joshua Heschel writes, "…labor is the means toward an end, and the Sabbath as a day of rest, as a day of abstaining from toil, is not for the purpose of recovering one's lost strength and becoming fit for the forthcoming labor. The Sabbath is a day for the sake of life…It is not an interlude but the climax of living." (p.14). Creating space in time to nurture our families is not a break or a vacation, but the very essence of living.

Further, the family unit is understood, in both our Hebrew and Christian scriptures, as the central and sacred entity in which we teach and learn and grow deeper in our faith, with which we worship God and follow Jesus. Deuteronomy 11:18-19 reminds us: "You shall put these words of mine in your heart and soul, and you shall bind them as a sign on your hand and fix them as an emblem on your forehead. Teach them to your children, talking about them when you are at home and when you are away, when you lie down and when you rise." Similarly, in the Litany of Ordinations found in our Prayer Book: "For his/her family [the members of his/her household or community] that they may be adorned with Christian virtues." (Book of Common Prayer, p.549). Family leave is a practical, accessible way to strengthen the family unit, to care and nurture it so that it remains intact, strong, and focused in its capacity to grow and nurture the faith.

The gift of paid family leave roots us, deeper and more firmly, in our incarnational theology, in the Way of Love, and in our scriptural tradition. Through it, we can live more faithfully into what we profess to believe, and the Way of Jesus we follow.

History of resolutions

For over 35 years The General Convention of the Episcopal Church has been considering resolutions from various committees and interim bodies to establish what is now referred to as Church-Wide Parental Leave Policy and Practices. Resolution 1985-D083 from the 1985 General Convention urged dioceses “to include a policy for maternity/parental leave in conjunction with its personnel policies for sick leave, annual leave, leave with and without pay, and disability pay for its lay and ordained employees.” Six years later resolution 1991-D111 from the 1991 General Convention requested that dioceses report to the Executive Council on the status of their implementation of resolution 1985-D083; the resolution also included a request for the Church Pension Fund to inform each diocese of their income replacement policy. The 2000 General Convention received resolution 2000-C042 from the Committee on Ministry that provided additional details to include in their policies concerning clergy maternity/paternity leave. The resolution reads as follows:

> *Resolved*, That the 73rd General Convention urge the Executive Council and all dioceses to include the following in their policies concerning clergy maternity/paternity leave:
>
> - A member of the clergy who has been employed by the church for one full year and is the designated "primary child-care parent" is entitled to leave for the birth or adoption of a child for a minimum of eight weeks with pay. Up to eight additional weeks may be taken without pay. The member of the clergy may elect to use vacation leave or sick leave during this latter period.
> - A member of the clergy who has been employed by the church for one full year and is the "non-primary care parent" is entitled to leave for the birth or adoption of a child for a minimum of two weeks with pay and up to ten additional weeks without pay.
> - A member of the clergy not employed by the church for one full year is entitled to the same numbers of weeks leave. Pay during this period is negotiated between the employer and the member of the clergy.

It was not until 2009 that an Act of General Convention 2009-A166 articulated “the importance of family in the life of clergy and laity employed by the Church” and yet language of the resolution remained one of urging dioceses and congregations to establish policies for employee parental leave for clergy and laity in cases of both birth and adoption “consistent with local employment laws and generous industry standards.”

It would be another 6 years until the 78th General Convention as part of resolution 2015-D030 directed “the Executive Council in consultation with the Church Pension Group to prepare a church wide model policy on parental leave for both birth and adoptive parents for consideration by the 79th General Convention."

In 2018 again the General Convention urged "every diocese to review such model policies and to implement comprehensive policies on family leave that fit their respective needs" as part of resolution 2018-A223. However, as part of resolution 2018-C019 the Episcopal Church took a step towards establishing churchwide policies and away from diocesan level policies by calling upon the "the Presiding Bishop and President of the House of Deputies to appoint a task force…to research and create, in consultation with the Church Pension Group, a proposal for a church-wide paid family leave policy for consideration at the 80th General Convention."

Plan Design and explanatory text

The Episcopal Church is interested in exploring the feasibility of offering a Paid Family Leave (PFL) benefit to its clergy and lay employees. PFL programs are very popular with private sector and public sector employers and they play an important role in employee attraction and retention strategies. Several states have mandated PFL programs that employers must offer and there is significant additional PFL mandate legislative activity at both the state and local level. PFL programs can be costly and administration can be complex, especially for employers like the Episcopal Church where no centralized payroll and Human Resource systems exist. PFL programs are funded by employers and there are no insurance products in the marketplace, so employers bear the full risk of the cost of these programs. In practice the cost of a PFL plan can be material and the implementation of a new plan should be carefully thought out from an expense perspective. Employers typically create a PFL line item in their annual benefits budget to recognize the expense rather than treating the expense as a payroll cost. Annual PFL benefit expense growth is typically aligned with underlying compensation growth once plan utilization stabilizes.

To date insurance companies are reluctant to take on the administration of an employer's PFL plan due to administrative complexities, so most employers rely on the benefits and payroll departments for administration needs. In some cases, decentralized payroll systems and a lack of internal staff to manage a PFL program have been barriers to the launch of a successful program.

We have developed three model PFL plans which include varying degrees of plan value as shown in the following table.

The table should be read by row and not by column. The final Church plan design will likely contain provisions that are selected from each of the three model designs (bronze, silver, platinum). These Model Plan Designs address Paid programs. They do not preclude an employer from offering additional unpaid leave which can be coordinated with the paid portion of a leave. For purposes of this table "Eligible Individuals" includes clergy and lay employees.

Model Plan Designs

Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
Eligible Individuals	All clergy and lay employees after 1 year of service. If an eligible individual resigns and returns to the Church a new 1 year waiting period must be satisfied.	**All clergy and lay employees after 6 months of service.** If an eligible individual resigns and returns to the Church within 6 months, the eligible individual's prior service will be bridged and counted towards their eligibility.	**All clergy and lay employees as of Date of Hire**
Duration of Paid Leave (rolling 12 months or calendar year)	6 weeks paid	**12 weeks** paid	**16 weeks** paid
Benefit as a % of covered weekly earnings	70% (this aligns with the STD plan)	**100% for 3 weeks then 70% for balance of the leave**	**100% for the duration of the leave**
Qualified family members	Eligible family members include spouses, domestic partners (same and opposite sex), children under 18 years of age or if 18 years of age or older and "incapable of self-	Eligible family members include spouses, domestic partners (same and opposite sex), children under 18 years of age or is 18 years of age or older and "incapable of self-care	Eligible family members include spouses, domestic partners (same and opposite sex), children under 18 years of age or is 18 years of age or older

Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	care because of a mental or physical disability", parents, grandparents, grandchildren and siblings. It does not include other family members not stated above.	because of a mental or physical disability," parents, grandparents, grandchildren and siblings. The plan sponsor can also identify other eligible family members by description such as cousins, aunts, uncles, etc. but not by specific named people.	and "incapable of self-care because of a mental or physical disability," parents, grandparents, grandchildren, siblings. The plan sponsor can also identify other eligible family members by description such as cousins, aunts, uncles, etc. but not by specific named people. **Others as identified by the eligible individual who depend on the eligible individual for support or assistance.**
PFL usage rules for Paid Parental Bonding and Paid Caregiver leave	Usage rules vary based on the nature of the leave: **Paid Parental/Bonding Leave**: PFL can be taken to bond with a new child all at once, or it can be taken in 2 blocks of time (defined as any block of continuous calendar days). Qualified bonding leaves must be started and concluded no later than one year after the birth, adoption, or placement of the child **Paid Caregiver Leave**: PFL can be taken to care for a family member with a serious health condition all at		Usage rules vary based on the nature of the leave: **Paid Parental/ Bonding Leave: PFL can be taken to bond with a new child all at once, or it can be taken in full day increments.** Qualified

Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	once, or it can be taken it in minimum one day increments. A one-day increment is defined as the regular hours an eligible individual is scheduled to work for a given day. For most eligible individuals, a one-day increment will be 8 hours. However, one day for a part-time eligible individual may equate to 6 hours if this represents a scheduled work day.		bonding leaves must be started and concluded no later than one year after the birth, adoption, or placement of the child **Paid Caregiver Leave: PFL can be taken to care for a family member with a serious health condition all at once, or it can be taken it in minimum 4 hour increments.**
Coordination with local and State mandated programs	Runs concurrent with mandated programs		Runs **consecutive to** mandated programs
Multiple reasons for PFL leave	Eligible individuals are limited to 6 weeks of PFL during a 12-month calendar year period. If an eligible individual exhausts their PFL to bond with a new child, they would not be eligible for additional	Eligible individuals are limited to **12 weeks** of PFL during a 12-month calendar year period. If an eligible individual exhausts their PFL to bond with a new child, they would not be eligible for additional	Eligible individuals are limited to **16 weeks** of PFL during a 12-month calendar year period. If an eligible individual exhausts their PFL to bond with a new child, they would not be eligible for

Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	time off under this policy to care for a family member with a serious health condition if it is within the 12-month period	time off under this policy to care for a family member with a serious health condition if it is within the 12-month period	additional time off under this policy to care for a family member with a serious health condition if it is within the 12-month period
Rules that apply when both parents work for the same employer	Each eligible individual will be allowed to take Paid Family Leave under this policy. However, there may be circumstances where both eligible individuals cannot take the same period of time off work unless special approval is received from the applicable Personnel Manager.		
Job protection while on leave	Yes		
Definition of covered weekly earnings	**CPG STD/LTD plan "Covered Weekly Earnings"** definition: means the member's gross weekly rate of earnings from the employer plus the weekly rate of any housing and utility allowance received from the employer by the covered person. However, such earnings will not include income received from commissions, overtime pay or any or any other extra compensation or income received from source other than the employer other than income actually received from bonuses. Earnings will be based on the annual earnings just prior to the date of disability.		
Definition of a parent for bonding leave	Parents include one of the following relationships to the new child: biological mother, biological father, a spouse/domestic partner of a biological mother or father, or a newly adoptive or foster care parent		
Qualified reasons to take a PFL leave	Paid Family Leave allows an eligible individual to take time off from work to care for an eligible family member with a serious health condition, or for a parent to bond with a new child entering the family through birth, adoption, or foster care placement		

<table>
<tr><th>Plan Provision</th><th>Bronze Plan</th><th>Silver Plan</th><th>Platinum Plan</th></tr>
<tr><td></td><td colspan="3">A serious health condition is defined as an illness, injury, impairment, or physical or mental condition requiring inpatient care in a hospital, hospice, or residential medical care facility, or continuing treatment or supervision by a health care provider For example:
Ongoing serious health condition that continues over an extended period of time, patient is seen at least twice per year for treatment by a health care provider, and may cause episodic periods of incapacity
Long-term or permanent period of incapacity due to a condition for which treatment may not be effective and the family member is under continuing supervision of a health care provider
Treatment or recovery from restorative surgery after an accident or other injury, or a condition that would likely result in a period of incapacity of more than three consecutive full days in the absence of treatment
An initial incapacity of more than three consecutive calendar days involving being seen by a health care provider for treatment within the first 7 days of when the incapacity began and 1) seen a second time by the treating provider within 30 days of when incapacity began OR 2) a regimen of continuing treatment under the supervision of the health care provider</td></tr>
<tr><td>Required documentation to submit a Leave Request</td><td colspan="3">In the discretion of the employer/administrator, these items may be required:

Paid Parental/Bonding Leave:
Hospital record showing the child’s birth
Hospital generated birth certificate/record
Child’s birth certificate
Child’s hospital discharge record
Foster Care Placement Record</td></tr>
</table>

<table>
<tr><th>Plan Provision</th><th>Bronze Plan</th><th>Silver Plan</th><th>Platinum Plan</th></tr>
<tr><td></td><td colspan="3">Adoptive Placement Agreement
Child’s passport showing immigration and naturalization service stamp
Footprints the hospital provide parents so long as a DOB is included
Paid Caregiver Leave:
A certification form that is similar to the Federal Family and Medical Leave Act (FMLA) certification form</td></tr>
</table>

Plan Design Component Selection Decision Point

The PFL program is designed to be implemented at the Diocesan level with parity in design and administration between clergy and lay employees. Each Diocese will decide if it will allow individual churches to adopt plan design variations within the permitted levels of the program. The plan design selection should be made based on the cost of the programs and the administration requirements of the programs.

Plan Funding Decision Point

Each Diocese must decide whether the cost of the PFL program will be paid at the individual church level based on utilization of that church’s clergy and employees, or whether the Diocese will assess all churches in the Diocese a flat amount to be pooled and used to reimburse individual churches for the cost of PFL usage. To accomplish the latter, a Diocese would have to do a cost study based on the PFL program selected and the demographics in the Diocese. See below for a further discussion of calculating plan costs.

Model Plan Design Cost Analysis

In order to calculate the annual cost of a PFL plan, demographics, leave of absence, disability and healthcare data is used along with a series of assumptions. The analysis includes a projection of which eligible individuals would take PFL time for what reasons, for how long and at what salary. For instance, eligible individuals who are beyond child bearing years are not expected to take a bonding leave but may very well take a leave to care for an ill family member, and they may be more highly compensated than a younger eligible individual, but the duration of the leave may be shorter than a typical bonding leave duration. Further they may be apt to take the leave intermittently whereas a bonding leave is more frequently taken on a continuous basis. If siblings, grandparents, grandchildren and/or "significant others" are included as eligible family members the cost analysis is complicated because estimations would have to be made on how many of these eligible family members exist and might have a condition that requires care resulting in a PFL leave.

Most employers who are interested in conducting a cost analysis employ the services of a consulting firm due to the complexity of the analysis and the assumptions that factor into the calculations. The consulting firm issues data requests to the employer, the disability vendor and the healthcare provider. Healthcare data is focused on the number of births and major dependent surgical procedures.

The demographic data request includes the following:

- Employee identifier
- Gender
- Date of birth
- Date of hire
- Annual compensation (base, bonus, housing allowance, other)
- Work state
- Salaried/Hourly class
- Full-time/Part-time status

The leave and disability data request includes the following with subscriber IDs that align with the demographic file employee identifier:

- An Excel file of all medically related absences for the most recent 24 months including diagnosis

- Detail of any other employer sponsored medically related and non-medically related leave of absence data
- An excel file of all STD claims incurred for the most recent 24 months

The healthcare data request includes the following with subscriber IDs that align with the demographic file employee identifier:

- Dependent maternity delivery claims including a subscriber ID that aligns with the demographic file employee identifier
- Dependent claims that warrant referral to the healthcare plan case management function
- Dependent claims that are referred to stop loss carriers for plan reimbursements
- Dependent claims that contain other severe diagnoses and expected long recovery times

The output of the plan analysis should include a range of cost estimations for the new PFL plan expressed on a per eligible individual per year basis. The cost can be broken down by expected claim costs and expected program administration costs. The range of costs should be based on projected low, medium and high utilization rates which will show best case costs, worst case costs and an average of the two.

The analysis output should include a list of all assumptions that were used in the cost analysis. First year cost estimations of a new PFL program are the most difficult to make. Once the plan is in effect for at least a year future cost projections can be fine-tuned, and utilization patterns will emerge which will allow for more exacting future year cost estimations.

We declined to attempt to create a sample cost calculation for a hypothetical Diocese, because we believe it would not be helpful and might actually be misleading.

Plan Administration Considerations

The vast majority of PFL plans are internally administered on a centralized basis via a combination of Human Resources, Benefits, Payroll and IT efforts. In some cases, employers have co-sourced the administration of the program by retaining their leave and disability carrier for certain plan administration functions.

The administration of a PFL plan includes:

- **PFL Policy development and maintenance:** A clearly written, comprehensive policy is required especially for new PFL programs. The policy should include all of the Plan Provisions that are included in the Model PFL Designs. The policy should address compliance with legislated local and state leave laws and how the PFL policy coordinates with these legislated programs. All policies should be reviewed by local counsel to ensure compliance with local law. The policy will serve as a basis for communicating the plan to participants and managers and it will be relied on for dispute resolution. Consultants are commonly asked to draft polices and there are also many policy examples in the public domain that an employer can use as a starting point if they opt to draft their policy with no consulting support.
- **Manager training:** Managers and supervisors will have to be trained on the mechanics of the PFL program as plan participants typically turn to their managers for advice on how the program works. This training can be delivered via recorded video sessions, in person training sessions and most commonly via a Manager Tool-kit which should include the Policy, all application forms, FAQs, payroll and HRIS system coding requirements, examples of how the plan would apply in specific circumstances such as bonding vs. care of an ill family member, guidance on contact with eligible individuals while they are on leave, employer computer network access while on leave, etc. Employers tend to prefer the tool-kit approach since all information is housed in one location and new manager training can be conducted via a review of the contents of the tool-kit. Depending on the administration model that is developed, managers may also find themselves responsible for a quasi-customer service function. Plan participants will invariably have questions about the program both before taking a leave and while on leave and many of these questions may involve pay related issues. Some employers rely on a centralized program management function for customer service issues. Since the Church does not have a centralized HR function it would make sense to have local managers involved in managing participant questions.

- **Education and plan rollout:** Employee education includes the development of communications material and it can include many of the documents included in the manager tool-kit. Eligible individuals will have to be introduced to the new benefit and most employers take advantage of the opportunity to both educate eligible individuals and to benefit from the good will that comes with the roll out of the new plan. Many of our clients have produced public relations materials as appropriate that coincide with the roll out of the new plan.
- **Record keeping:** Record keeping refers to the actual processing of PFL leave events. This function is typically maintained on a centralized set of payroll and HRIS systems. Eligibility is typically maintained in the HRIS system. The payroll system is used to issue the PFL benefit which may be on a partial day, full day or a full week basis depending upon the usage rules that the Church chooses to implement. The payroll system is also used to "debit" time from an eligible individual's bank as it is used. The PFL program will necessitate the creation of a new payroll system code that is specific to PFL time taken. In some cases, disability program vendors will provide PFL program administration services although these arrangements are limited to employers with centralized payroll and HRIS systems. External vendors are unlikely to be interested in providing program administration services to clients with decentralized or fragmented systems.

Proposed resolutions

A003 Uniform Paid Family Leave Policy

Resolved, the House of ____ concurring, That the 80th General Convention recognizes the critical importance of the adoption by The Episcopal Church (the "Church") of a uniform paid family leave policy across the Church, and that this is a justice issue which we are obligated as Christians to address without further delay, and that from the beginning, said policy should provide for parity between lay and clergy employees; and be it further

Resolved, That the 80th General Convention recognizes the difficulties that currently exist with the implementation of a paid family leave policy, given that there is currently no commercial insurance offering available, and therefore, urges all dioceses of the Church to adopt the proposed policy as soon as practicable, in order to be prepared to implement the policy as soon as a commercial insurance offering becomes available, whether through Church Pension Group or other avenues; and be it further

Resolved, That the 80th General Convention urges all dioceses of the Church to adopt a uniform paid family leave policy (hereinafter, "UPFLP") at the minimum acceptable level of coverage which should be provided to all employees, and that to the extent that there is a church or other affiliated organization that offers a more comprehensive policy, the policy outlined in this resolution is to be considered the minimum acceptable offering; and be it further

Resolved, That the UPFLP will be modeled along the following parameters:

a. The Church plan design for the UPFLP will be set up to offer the options of bronze, silver or platinum plans;
b. The UPFLP will, in its final version, provide a thorough cost analysis, and it is anticipated that the services of an outside consultant will be needed to analyze relevant demographic data in order to provide accurate cost estimates, and further, it is understood that it is currently not possible to share the cost of the UPFLP nationally through an insurance-type program, and therefore, each diocese will need to have the discretion to determine how the cost of the UPFLP will be shared among the churches in that diocese;
c. The UPFLP will also, in its final version, provide a thorough outline of plan administration considerations in order to assist with developing and maintaining a policy, training supervisors, educating employees, and record keeping;
d. The UPFLP will in all instances provide for parity of clergy and lay employees;
e. The UPFLP will in all instances provide for both paid parental/bonding leave, as well as paid caregiver leave; however, levels of plans may vary in terms of which family members will be covered by said caregiver leave;
f. In all instances, the UPFLP will provide for job protection for any employee on leave;
g. The UPFLP will provide for a duration of leave of between 6 and 16 weeks;
h. The UPFLP will offer options to cover between 70% and 100% of covered weekly earnings;
i. The UPFLP will also provide specific guidance for a variety of specific factors such as how coverage will apply to two parents working for the same employer, definition of covered weekly earnings, qualified reasons to take leave, required documentation to request leave, and coordination with applicable state and federal laws.

Resolved, That the General Convention affirms the teaching that the birth or adoption of a child is a cause of celebration for parents, family and the entire community and that an entire community has responsibility for supporting a family in raising a child; and that family members often need to care for one another in sickness, and that this care and ministry serves to give confidence of your loving care; and that individuals suffering from illness may not be able to work for a period of time; and be it further

Resolved, That the General Convention recognizes that the federal government has a role in ensuring those who are sick are cared for, and that all have sufficient healthcare, enough to eat, adequate housing, and that illness does not economically devastate families. Therefore we call on the federal government to institute a funding mechanism for citizens to take paid family leave in order to care for a newborn child, a foster or adopted child, or immediate family members who require care during illness, as well as providing paid sick leave to the fullest extent possible; and be it further

Resolved, That the General Convention calls on the Office of Government Relations to advocate to the Congress for the establishment of a paid family leave program, in particular for workers who do not have access to paid leave from their employers.

Budget

$22,000 was paid to American Benefits Consulting to develop three model Paid Family Leave plans.

TASK FORCE TO DEVELOP MODEL SEXUAL HARASSMENT POLICIES & SAFE CHURCH TRAINING

Membership

Ms. Judith Andrews, *Chair*	Olympia, VIII	2021
The Rt. Rev. Laura Ahrens, *Vice-Chair*	Connecticut, I	2021
Ms. Kemah Camara	Washington, III	2021
Ms. Cookie Cantwell	East Carolina, IV	2021
Dr. L. Zoe Cole	Colorado, VI	2021
The Rt. Rev. Mark Cowell	Western Kansas, VII	2021
The Rev. Gwen Fry	Arkansas, VII	2021
The Rev. Ivette Linares	Puerto Rico, IX	2021
The Rt. Rev. Kimberly Lucas	Colorado, VI	2021
Ms. Caren Miles	California, VIII	2021
The Rev. Deacon Tim Spannaus	Michigan, V	2021
Mr. Eric Travis	Michigan, V	2021
The Rev. Charlotte Wilson	California, VIII	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rev. Julie McCray-Goldsmith, resigned February 2020, replaced with The Rev. Charlotte Wilson.
The Rev. Gwen Fry, resigned December, 2020.

Acknowledgements

The Rev. Shannon Kelly, Director of the Department of Faith Formation, The Episcopal Church
Ms. Kathleen M. Floyd, Senior Vice President: Education and Wellness, Church Pension Group

Mandate

2018-A048 Establish Task Force to Oversee Creation of Training Materials

Resolved, That this 79th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.(o) to create and implement new safe church training materials to be developed during the next triennium to reflect the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults, such committee to be comprised of at least nine (9) and no more than twelve (12) people who reflect the diversity of The Episcopal Church, which should include youth ministers, those working with vulnerable adults, educators for adults, and those experienced in the prevention of sexual abuse; membership should also include at least three (3) persons from the Task Force to Update Sexual Misconduct Policies appointed in 2015; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate their training program with this effort and to appoint a member to serve on the committee; and be it further

Resolved, That such safe church training materials for the prevention of sexual misconduct include written and web-based training materials that include responsive and multilingual online web-based resources, a modern content management system and a curated resource list, such training to provide Universal Training accessible to all congregants and ministry participants that fosters a culture of safety and inclusion for all people and Specialized Training consisting of discrete modules on topics directly related to ministry roles and functions; and be it further

Resolved, That this 79th General Convention assign to the Task Force that will oversee the new safe church training materials the following duties: where and how to host training materials that includes a comprehensive list of resources, develop a plan for continued updating of the training materials and the curating of resources, as well as a plan to oversee this work; and be it further

Resolved, That this 79th General Convention direct the Domestic and Foreign Missionary Society [DFMS] to host on its website the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults for the prevention of sexual misconduct approved in 2017; and be it further

Resolved, That this 79th General Convention of The Episcopal Church commits itself to the financial support of the creation, implementation and maintenance of such safe church training materials to advance clergy wellness and reduce liability.

2018-A109 Create Task Force on Sexual Harassment

Resolved, That the 79th General Convention of the Episcopal Church declares that sexual harassment of adults by clergy, church employees and church members are abuses of trust, a violation of the Baptismal Covenant, contrary to Christian Character, and are therefore wrong; and be it further

Resolved, That the 79th General Convention of the Episcopal Church establish a Task Force on Sexual Harassment to be appointed by the Presiding Bishop and the President of the House of Deputies to prepare a Model Policy for Sexual Harassment of Adults for Dioceses, including parishes, missions, schools, camps, conference centers and other diocesan institutions. It shall be the duty of the Task Force to study, educate, develop curriculum, and propose and promulgate model policy and standards of conduct on different forms of harassment, and to advise the Church as resource persons. The membership of the Task Force is to be representative as to gender, race and ethnic diversity and should include lawyers whose practice covers this area of law or who serve or have served as chancellors for a diocese or church, human resource professionals, educators for adults, and those experienced in the prevention of sexual harassment. Approximately one-third of the members of the Task Force shall be clergy. The Task Force will report to the 80th General Convention and include as part of its report a Model Policy for Sexual Harassment of Adults for Dioceses.

Summary of Work

The work of the Task Force to meet each of its mandates is summarized below. The Task Force broke into two subgroups in order to more effectively accomplish its dual mandates. The whole Task Force met regularly to report on progress and to deliberate and make decisions as a group.

The Process to Create Training Materials

1. Content Analysis

The Training Subgroup identified topics and desired learning outcomes for the training, based on the 2018 Model Policies and Model Anti-Harassment Policy summary document and the Best Practices Guide. Consistent with those documents, the new content eliminates the triggering and blaming aspects of the previous training, focusing on adopting safe practices and building a faithful culture of welcome and clear boundaries.

2. Scope and Sequence

The subgroup organized the topics, subtopics and concepts into courses, based on how topics and concepts related to each other and by the intended audience.

See the Content List below in Appendix A.

3. Vendor identification

During the Chicago meeting, the Task Force screened courses and content from as many potential vendors as could be identified. Additional reviews were conducted in subsequent weeks. The Task Force paid attention to accuracy of content, theological perspectives, instructional design, suitability for use by TEC, and compatibility with contemporary learning management systems. Several vendors were selected for further review. The list of potential vendors was narrowed to two, both of whom had experience working with TEC and demonstrated capability to produce exceptional courses.

4. RFP

The Task Force issued a Request for Proposals to the two vendors and established a calendar for questions, proposal submission, reviews and presentations of proposals, followed by evaluation and award. The RFP specified course content, delivery and management capabilities, technical requirements and desired schedule. The Task Force invited the vendors to present their proposals to the Task Force May 19 and 20, 2020.

5. Award

The Task Force awarded the project to Praesidium, Inc., which had created the current Safeguarding courses used by TEC. The proposed courses are designed to be all new, not repurposing the current Safeguarding content, and with a changed focus and ethic: the focus of the new courses is honoring our Baptismal Covenant by creating and maintaining a safe environment, without the previous emphasis on avoiding litigation and pro forma compliance. Following the lead of the Model Policies, the new courses are designed to be soundly based in baptismal theology, enabling learners to see and be Christ to all they encounter in their ministries.

6. Development

In the Development phase, major responsibility shifted to Praesidium, as they created training materials for the web and for instructor-led classes. The Training Subgroup reviewed content as development progressed, looking for accuracy, completeness, faithfulness to TEC theology, practice, culture and norms, as well as instructional integrity and suitability for our audiences.

7. Listening Sessions

To assist the Task Force in gaining information and listen to experiences outside of Task Force members, Listening Sessions were developed. The purpose of the Listening Sessions was to ensure that as the Task Force develops the Training Materials, we had the opportunity to hear from the diverse membership of the church regarding topics, training methods, current experiences, and personal stories around each of the Training Areas.

A survey was prepared and sent out to the Church through Episcopal New Service, the General Convention Office and other networks that Task Force members were a part of. The survey asked for demographic information and invited people to indicate which Training Topic they were interested in being a part of for an online Listening Session. Utilizing the data, the Listening Sessions were created to be as diverse as possible. 2 sessions each of the 9 topics were scheduled for November and December. A moderator was hired, and along with Task Force members, listened to over 150 members of TEC. The information and suggestions shared have helped the Task Force to develop the training modules.

8. Content of New Training Materials

A detailed outline of the training materials to be produced by Praesidium with input and participation of the Task Force is listed below in Appendix A.

9. Work remaining for the next triennium

Significant work remains for the 2022-24 Triennium, primarily including translation and cultural adaptation for speakers of Spanish and French. Translation by itself is not adequate, as metaphors, images and guidelines do not work equally well across contexts. Native speakers of Spanish, Creole and French, representing the cultures found in TEC from Province IX to the American Southwest, from Haiti to Europe, are best able to facilitate the adaptation of Safe Church content throughout the Church.

THE PROCESS TO CREATE ANTI-HARASSMENT MATERIALS

The subgroup began its work by broadening the scope of its work to cover harassment generally, because both formal reports and anecdotal evidence demonstrated that the full scope of the problem in the Church was broad, preventing too many members, both lay and ordained, from living fully into our gifts and bearing witness to the Good News. The subgroup also identified initial goals to include seeking out models for its end products. We engaged in close examination of our authorizing resolution; the work of the House of Deputies Special Committee on Sexual Harassment and Exploitation; consultation with the Task Force to Study Sexism in TEC and Develop Anti-Sexism Training; and exploration of possible model documents. We established three guiding principles early on:

1. We were committed to producing resources for the whole Church. The multiple legal and cultural contexts that TEC includes would mean that we could provide only guides and samples, not a universal or binding policy for the whole Church. Each particular TEC context would ultimately need to develop their own culturally appropriate policies based on the principles, practices, and examples we could provide.
2. We wanted to produce two documents: first, a short summary document that could serve as a template for groups to develop an easily distributed, legally binding commitment against harassment; second, a guide to best practices for developing a fuller, more helpful policy for preventing harassment as well as responding well when it occurs. (In the end, we have included the short summary document as an appendix to the larger guide.)
3. There were no other denominational models for the kind of document we hoped to produce. We had to draw on a broader constellation of sources to develop ours: a few helpful policies from individual churches; diocesan policies and guides against bullying; and anti-harassment work in secular contexts (these last ran the gamut from Fortune 500 companies to punk rock and protest movements). We knew from the outset that this would mean whatever we produced this triennium would have to be, in essence, trial use documents that the Church could learn from and adapt as they began to be used.

From October 2019 to October 2020, the committee drafted both the Model Anti-Harassment Policy summary document and the Best Practices Guide and shared them with potential reviewers. We were able to have productive discussions with the rest of the Task Force and a very few chancellors and other outside readers; however, the reality of an entire society living through a pandemic together meant that it was extraordinarily difficult to schedule these meetings efficiently, and in the end, we were not able to workshop the documents as broadly as we had initially hoped and planned. In November 2020, we contracted with Jessica Davis Church Consulting for additional sensitivity editing, and updated the Best Practices Guide accordingly before submitting it in December.

1. <u>Content of the Best Practices Guide</u>

The Best Practices Guide is designed to help Episcopal churches, communities, or other organizations prevent, recognize, and respond to harassment in their midst. The Task Force sought to offer a resource that would serve Episcopal leaders, lay and ordained, in an understandable and easily contextualized way. It is grounded in scripture, theology, and our Baptismal Covenant and Christian identity. Recognizing that humans were meant for life-giving relationships and connection with God, each other, and creation, the document begins with a theological statement and a spiritual call to action.

In creating this Guide, the Diocese of Newark's Dignity At Work Task Force's report to their 141st Convention, "Fostering Respect in Church Settings: Collaborating to Reduce Bullying within our Church Community" (January, 2015) served as a particularly helpful resource.

The segments of the Best Practices Guide include:

- Introduction
- Spiritual Call to Action
- The Legal and Ecclesiastical Position
- How Can Congregations, Dioceses, and other Church Organizations Help to Prevent and Respond to Harassment?
- Appendix A: Examples of relevant behavior, possible remedies, and potential consequences
- Appendix B: Sample resources for persons directly involved
- Appendix C: Model Anti-Harassment Policy

The Model Policy provides a broad overview of the conduct that can be understood as harassing as well as a definition of sexual harassment. It encourages all Episcopal Church leaders, lay and ordained, to respond to harassment whenever they witness it, recognizing leaders' particular responsibility for ensuring a harassment-free environment and prompt responses to hurtful behavior.

The Model Anti-Harassment Policy is a short document that can be easily posted and distributed. It is not intended to serve as the sole statement on harassment for any Episcopal organization. Instead, it is provided as a starting point from which to craft a robust, context-specific policy with detailed information on how to prevent, report, and respond to harassment in the community.

A copy of the Best Practices Guide, including its appendices is attached to this document below as Appendix B.

2. Vision and Design of the Best Practices Guide and Model Anti-Harassment Policy

The Model Anti-Harassment Policy summary guide and Best Practices Guide reflect the understanding that harassment in a variety of forms permeates the Church. Harassment is perpetrated in many forms and settings; harassers include both clergy and lay people, and the harassed are also both clergy and laity. In some cases, senior clergy harass clergy with less status and/or who represent minority identities. In other cases, the harassers are laity and the victims are clergy (again, often clergy who represent minority identities. And although Title IV presumably addresses incidents of clergy harassment of laity, in too many cases, the form of harassment does not rise to the level recognized by even the informal structures of Title IV. The Model Anti-Harassment Policy summary guide and Best Practices Guide also recognizes that one comprehensive document to cover every context in The Episcopal Church is impossible, and so the Model is to have every institution in TEC follow the Best Practices Guide guidelines to develop their own policies and to keep within the parameters outlined in the Best Practices Guide and to use the Anti-Harassment Policy summary guide as the starting point.

The Task Force envisions these documents to be disseminated to the entire church and available online. The Task Force also envisions that every Congregation, Diocese, and other Church Organizations in The Episcopal Church create and adopt their own Anti-Harassment Policy from the guidance of these two documents by the end of the next triennium.

3. Work for Next Triennium

Preliminary Anti-Harassment training materials are already being created by Praesidium as part of the Safe Church training in a module described in Appendix A. However, the nature of the problem and the variety of contexts in which The Episcopal Church engages in ministry (including different legal as well as cultural contexts and the many forms that harassment can take) means that the work cannot be completed in a single triennium. The work must continue, ideally with a combination of continuing task force and new task force members (representing additional diversity within the Church). This continuing body will need to evaluate these preliminary training materials to determine what is still missing, what needs to be refined, and to continue the development of training curricula throughout the church. The continuing work will include costs for both language translation and adapting the core curriculum for different ministry and cultural settings. "Train the Trainer" materials will also need regular updating to support implementation of the Model Policy and Best Practices Guide.

In order to facilitate the on-going development and training necessary to address the breadth of the problem and the institutional resistance to acknowledging or addressing the problems, the Model

Policy and Best Practices Guide will need to be publicized, while use and local adaptation must be encouraged at all levels of diocesan and institutional hierarchies.

A website has already been created for the revised and updated Safe Church policies and training. Because of the overlap of the subject matter and the fact that the of Resolution 2018-A109 and Resolution 2018-A049 were combined in a single task force, it makes sense that this skeleton website also be used to host the Anti-Harassment Model Policy and Best Practices Guide and related resources as they are created and curated. Like the Safe Church resources, the Anti-harassment resources will also need to be updated. The continuing body should also be equipped to take on that work.

Proposed resolutions

A064 Promote the Adoption and Use of Revised Praesidium Safe Church Training

Resolved, the House of ____ concurring, That the 80th General Convention direct the Office of Communications and the Office of Formation of the Episcopal Church, working in collaboration with FORMA and the Church Pension Group, to use the communication and marketing facilities of The Episcopal Church to promote the adoption and use of the revised Praesidium Safe Church training throughout the Church; that such promotion, marketing and communication vehicles should update all existing references to Safe Church training and reinforce the importance of creating a welcoming, safe environment for all of the people of God participating in Church sponsored or affiliated ministries, programs, congregations and other activities; and be it further

Resolved, That $15,000 be budgeted for the implementation of this resolution.

EXPLANATION

In 2003, General Convention directed each diocese to develop and adopt policies for the protection of children and youth. In 2015, General Convention directed that these policies be updated, and in 2018, General Convention directed that training for the protection of youth, young adults, and vulnerable adults be updated. Despite Church's commitment to the safety of all, especially children, not all dioceses have consistently implemented their own policies or those updated policies. In order to assure that this commitment is fully implemented, especially as training is being updated to reflect the update of the policies in 2017, the Church must commit resources actually capable of doing so. While the Office of Communication is well-suited to the task of promotion and marketing, the subject matter of the policies requires that the Office of Formation also be involved and authorized to work in conjunction with FORMA and the Church Pension Group, which also has a vested interest in assuring that relevant parish and diocesan leaders throughout the church have demonstrated their practical commitment to the protection of children, youth, young adults, and vulnerable adults, by completing and updating training in this matter, especially the updated and revised training.

A065 Translation and adaption of Safe Church training for speakers of Spanish, Creole and French

Resolved, the House of ____ concurring, That the 80th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.0 to create and implement Spanish, Creole and French language Safe Church training materials to be developed during the next triennium to reflect the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults, such committee to be comprised of twelve (12 people who reflect the diversity of The Episcopal Church, which should include youth ministers, those working with vulnerable adults, educators for adults, at least eight (8 native speakers of Creole, French and Spanish from several regions and those experienced in the prevention of sexual abuse; membership should also include at least three (3 persons from the Task Force to Develop Model Sexual Harassment Policies & Safe Church Training appointed in 2018; and be it further

Resolved, that such new training materials be based on the Safe Church training developed in the 2018-2020 triennium by Praesidium, Inc., and that the new multi-lingual training be adapted to the variety of cultures in The Episcopal Church, in use of language, images, metaphors, examples, and the like; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate their training program with this effort and to appoint a member to serve on the task force; and be it further

Resolved, That the 80th General Convention of The Episcopal Church commits itself to the financial support of the creation, implementation and maintenance of such safe church training materials to advance clergy wellness and reduce liability; and be it further

Resolved, That $300,000 be budgeted for the creation of the French, Creole and Spanish Safe Church training materials described in this resolution and $50,000 for the work of the Task Force.

EXPLANATION

In 2018, General Convention directed development of training to implement the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults. This training will have been developed in English by June, 2021. To make the training available across the church, it needs to be translated to the official languages of the Church. Literal translation is not the goal: The training must reflect the variety of cultures and traditions found in the Church, so that it can have the effect of changing behaviors and attitudes wherever the people of God interact.

The provided budget allows a translation process modeled on that of the Book of Common Prayer, with a single translator for each language, providing a unity of voice throughout the training, to be supported by consultants representing different regions. The consultants have the responsibility of assuring that the language and content are received and understood in their contexts. The budget also provides for implementing the three languages into the online and instructor-led learning materials.

The resolution further requests the continued support and maintenance of the translated versions of the training by Church Pension Group, consistent with the support of the prior versions of the training.

A066 Establish Interim Body to Oversee the Continuing Development of Anti-Harassment Best Practices, Model Policy Examples and Varied Training Materials

Resolved, the House of ___ concurring, That the 80th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.0 to oversee the continuing development and implementation of anti-harassment best practices, model policy examples, and varied training materials. The Task Force shall be comprised of at least nine (9) people who reflect the diversity of The Episcopal Church, to the degree possible, while also including those experienced in adult education, the prevention of sexual abuse, the prevention of employment discrimination, Human Resources, working with Title IV (including chancellors and Intake Officers), and working with survivors of abuse (including Victim Advocates); membership should also include at least three (3) persons from the Task Force to Develop Model Sexual Harassment Policies and Safe Church Training appointed in 2018; and be it further

Resolved, That the Task Force shall seek and consider feedback from local use and adaptation of the original model policy, from as diverse a group of communities within the Church as possible. The goal of the Task Force shall be to refine the Best Practices Guide, to gather samples of policies and practices in actual use across the Church, and to develop additional model policies for use in the broadest spectrum of church locations and extra-parochial communities; and be it further

Resolved, That the Church Pension Group be asked to collaborate with this effort and to appoint a member to serve on the Task Force; and be it further

Resolved, That the 80th General Convention of commit itself to the financial support of the continuing development of these materials, and training, as an element of its efforts to advance clergy wellness and reduce liability, as well as to the ability of all members of the Church to live into the Baptismal Covenant, seeking and serving Christ in all persons; and be it further

Resolved, That $75,000 be budgeted for the work of the Task Force over the next triennium.

EXPLANATION

While strong policies and training programs are essential components of this work, the various circumstances in which the church does its work, including geographic, legal, cultural, and ministry differences, mean that no single policy or even set of policies can meaningfully identify or address all harassment situations. The establishment of a continuing working group of members with related experience and expertise is essential to the capacity to engage the next step of the work that is required to fulfill the goals of Resolution 2018-A109 and effect long term improvements in the Church's witness to the image of God in each member and all with whom the church engages.

A067 Authorize and Support Interim Use and Local Adaptation of Model Anti-Harassment Policy in Light of Best Practices Guide

Resolved, the House of ____ concurring, That the 80th General Convention direct the Executive Council to provide for the support and encouragement of the interim use and adaptation of the Model Policy to Prevent Harassment by dioceses, congregations, and affiliated institutions; and be it further

Resolved, That the Best Practices Guide and Model Policy be hosted on the Domestic and Foreign Missionary Society [DFMS] Safe Church website. The website shall be adapted and monitored so that it becomes a site for on-going creation and curation of feedback from experimental use and local adaptation of the Best Practices Guide and Model Policy throughout TEC during the next triennium; and be it further

Resolved, That dioceses, congregations, and affiliated institutions report their feedback and recommendations for further development on the basis of their practice to the DFMS hosted Safe Church website.

EXPLANATION

The Best Practices Guide and Model Policy need to be easily accessible to all members and institutions of The Episcopal Church. The DFMS Safe Church website already provides access to the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults and is therefore the ideal location for the Anti-Harassment Best Practices Guide and Model Policy documents. Because the needs and the practices of the Church are so diverse with respect to definitions of harassment, and its reduction and elimination, the continuing collection of data and stories is vital to the development of standardized, yet helpfully varied, training. Because the Task Force proposed to be created by Resolution A066 will also need such information to continue its work, they must also be able to solicit and collect feedback from dioceses, congregations and members of the Church that are following the best practices in their use and adaptation of the Model Policy.

A068 Amend Canon 1.17 – Safe Church Training

Resolved, the House of ____ concurring, That Canon 1.17 be amended by adding a new Sec. 9:

Sec. 9. All members of this Church shall take and complete the course of Safe Church Training provided by the Church and the Church Pension Group so that all members can participate fully in creating and maintaining safe environments for all people throughout the Church.

EXPLANATION

The General Convention has been working to address issues of sexual abuse and exploitation within the Church since at least 1985 and has committed itself on multiple occasions to being and becoming a place where children, youth and adults are safe, especially from abuse, neglect and exploitation. This was the primary driver for and the purpose of Safe Church training. However, actual implementation and tracking of training and compliance with the requirements remains inconsistent across the Church. Thus, the time has come to put teeth into the Church's commitment through a canonical provision.

Existing General Convention resolutions do not require all members of the Church to complete the training, although all are strongly encouraged to do so. Continuing evidence demonstrates that the perpetrators of harassment and other forms of misconduct that compromise the Church's ability to witness to the dignity of all humans include lay leaders and other lay members of the church and its affiliates. Best practices research from the secular world confirm that the Bystander Intervention approach of training is most successful in actually reducing incidents of abuse and misconduct. Therefore, it is appropriate that all members of the Church, as defined by the canons, and not just active ministry leaders, be required to complete the training. Although the current training requires adaptation for members under the age of 21, the revised training specifically addresses the needs of the Church's younger members.

Although Resolution 2018-A051 directs that a safe church audit be included in the Diocesan Parochial Report, the report disseminated for reporting in January 2021 did not include this provision. Therefore, a canonical provision is necessary to assure that the whole church is committed to the process to live into the vision of the Church as a place where children, youth, and adults are safe, especially from abuse, neglect, and exploitation.

A069 Create DFMS Staff Position to Manage Safe Church Website and Respond to Inquiries

Resolved, the House of ____ concurring, That the 80th General Convention direct the Executive Council to create and fill a staff position, to serve as a point of contact for dioceses and individuals to obtain information about complying with the Model Policies for the Protection of Children, Youth, and Vulnerable Adults and the requirement to complete the updated Praesidium Safe

Church Training managed by the Church Pension Group; and reinforce the importance of creating a welcoming, safe environment for all of the people of God participating in The Episcopal Church sponsored or affiliated ministries, congregations, programs and other activities. This staff person shall report directly to the Canon to the Presiding Bishop for Ministry within The Episcopal Church; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate with this staff person and designate a member to liaise with the staff person, to assure that all necessary information is provided to those who contact the DFMS office with questions and concerns, subject to any applicable confidentiality and/or privacy restrictions, and in the collection and dissemination of information regarding the use and adaptation of diocesan and ministry-specific policies, as well as of use and adaptation of anti-harassment policies based on the Best Practices Guide; and be it further

Resolved, That $105,000, to include salary and benefits, be budgeted to fund this vital position.

EXPLANATION

The establishment of the Safe Church website provides a point of contact for the gathering and dissemination of information and in that sense can serve the Church well in its efforts to redress the comprehensive and long-standing problems of harassment, sexual abuse and exploitation. However, it is only the beginning of an on-going systemic response. The various listening sessions conducted by the Task Force to Develop Model Sexual Harassment Policies and Safe Church Training have confirmed that despite the long history of work in various dioceses and at various levels of the Church, the inconsistent implementation of training and response to allegations of misconduct by both clergy and laity in the Church leave many wondering where to turn and how to pursue redress for problems, especially, but not exclusively, when laity are the perpetrators of harm. A contact person is needed to help members of the Church, including lay and ordained leaders, identify resources to assist them in responding to complaints and creating cultures in which all members and participants feel safe and welcome.

Supplemental Materials

Table of contents:

Appendix A: Titles and Description of the Nine Modules for Safe Church Training

Introduction and Theological Background

- Reasons for the training
- Theological and ethical foundations
- Definitions
- Support video from the Presiding Bishop
- Different groups will get different training, depending on roles and responsibilities
- Content warning: uncomfortable topics; take care of yourself
- Prayer

Inclusion

- All people are beloved children of God
- We work to foster Beloved Communities where all people may experience dignity and abundant life
- Requirement of a commitment to form loving, liberating and life-giving relationships with each other
- How to recognize and respond to discriminatory language/behavior

Healthy Boundaries

- Physical and emotional boundaries
- Power imbalance
- Benefits of healthy boundaries
- Maintaining your own healthy boundaries
- Supporting others' boundaries
- Social media boundaries
- How to recognize and respond when you see unhealthy boundaries
- Adult specific
- Children & youth specific, including self-advocacy, and ways that young adults can speak up

Power Imbalances

- Definitions: age, size, physical, position, orders, race, class, gender, power of the group
- Recognizing - can't eliminate, only recognize them
- Power isn't bad; it's how it's used; abuse of power is the issue
- Healthy relationships
- Hierarchy
- Response to unhealthy expressions of power
- Dual relationships

Pastoral Relationships

- Definition
- Clarity of training & role (stay in your lane)
- Boundaries/restrictions on pastoral relationships and on both sides
- Dual relationships: friend vs friendly,
- Space (windows, doors, one-to-one Zoom, social media)
- Difference between pastoral relationship & counseling

Abuse & Neglect

- Adults - definitions
- Children and youth - definitions
- Identification/recognition
- What do you do if you see it or hear about it
- Reporting: Church and government requirements
- Who and how to report to
- Locate and use resources

Bullying

- Adults
- Children & youth
- Identification/recognition
- Locate and use resources
- When, who and how to report to
- Pastoral care for victims and bullies

Anti-Harassment

- Statement (reiteration*) of Healthy Relationship
- Define harassment, includimg sexual harassment & legal definition
- Overview of prevention methods, using several broadly representative examples
- How to handle complaints
- Maintaining healthy parish environment
- *building on/referencing work on boundaries, power differentials, and healthy relationships elsewhere in modules.

Organizational Rules and Specific Ministry Policies

- Model policies: Children and Youth, Vulnerable Adults
- Diocesan content
- Best practices
- Screening, Monitoring & Supervision standards

Train the Trainer

- Facilitation of online and face-to-face instruction
- Use of Safe Church courses and modules, including the Learning Management System

Appendix B: Best Practices Guide

Introduction

> We are putting no obstacle in anyone's way, so that no fault may be found with our ministry, but as servants of God we have commended ourselves in every way.
> *2 Corinthians 6:3-4*
>
> We all are called for service to witness in God's name.
> Our ministries are different, our purpose is the same:
> to touch the lives of others by God's surprising grace,
> so people of all nations may feel God's warm embrace.
> *"We all are one in mission", Wonder, Love, and Praise 779*

From the beginning, human beings were meant for connection and relationship. "It's not good that the human is alone," God said, and made a helper and partner.(1) As members of one body in Christ, as people called to minister in God's name, we seek to nurture interpersonal relationships that are healthy and life-giving for all. We hope and perhaps even expect that the Church should be a place where we can trust one another and where God's warm embrace feels comfortably close at hand.

Yet too often, the Church has fallen far short of that goal. The ways in which the Church has fallen short were detailed by the House of Deputies Special Committee on Harassment and Exploitation in 2018. They confirmed that many of the Church's members, lay and ordained, experience various forms of harassment that interfere with their ability to live fully into their vocations or roles and to participate in the life and work of the Church.(2) When any member harasses another, they abuse the trust of the whole Body, violate the baptismal covenant, and act contrary to Christian character. Harassment (whether by lay or ordained members of the Body) must be taken seriously by the whole Church, because when any member harms another, the whole Body is harmed.

Harassment is unwelcome conduct toward an individual on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, marital status, or any legally protected status, any time the conduct creates an intimidating, hostile, or offensive environment. Examples of harassment that may violate this policy include, but are not limited to (3)

- Oral, written, or electronic communications that contain slurs, negative stereotyping, offensive jokes, insults, or threats. This includes comments or jokes that are dismissive of human dignity or targeted at individuals or groups based on attributes listed above.
- Nonverbal conduct, such as leering and giving inappropriate gifts.
- Physical conduct, such as assault or unwanted touching.
- Visual images, such as derogatory or offensive pictures, cartoons, drawings or gestures. Such prohibited images include those in hard copy or electronic form.

- Expressed or implied demands for favors in exchange for some benefit (e.g., a promotion, a leadership role) or to avoid some detriment (e.g., termination, removed financial support for a pet project)

Taking harassment seriously includes taking seriously the differences of power resulting from distinctions in order and role, as well as power differentials that also exist outside the Church.[(4)] It includes doing all we can to prevent harassment from happening as well as providing structures for responding appropriately to stop harassment; for redressing harm caused by harassment to the harassed, the harasser, and the community; and for exploring how and when reconciliation may be possible. Such responses will and should vary depending on the circumstances.

This document is for you if you have ever witnessed or experienced harassment in the Church and wondered how you can help prevent it from happening to someone else. This document is for you if you have been accused of harassment in the past and wondered how you can avoid similar situations in the future. This document is for you if you work in shared spaces with representatives or ministries of the Episcopal Church and want to build a culture of mutual respect.

But this document is especially for you if you are a lay or ordained leader of any sort in any Episcopal church, community, or other context. When we accept leadership roles, we accept heightened responsibility for helping to set expectations in our context, as well as for noticing and redirecting harassing behavior in others. Leaders also bear a particular responsibility for understanding how their own behavior may land (including the reality that their behavior may land differently simply because they are a leader).

This document is designed to assist you in preventing and responding to harassment in your context. It serves as a statement and a guide for the Episcopal Church, to help ensure that the behavior of church members (individually and corporately) witnesses to the transforming power of God's love. It offers a set of best practices for developing consistent methods of preventing, identifying, and compassionately responding to the harassment we know is taking place in the Church. The practices outlined here are designed to govern all members of the Church, lay and ordained; employees of churches, broader Church or church-related entities such as camp & conference centers, schools, etc.; volunteers; service providers; and any others acting on church/institutional property or participating in church-sponsored events.

This document starts from the perspective of protecting those most vulnerable, because by doing so, we increase the safety of and support for all persons. Anyone may be harassed, and anyone may harass another person; however, women; trans, nonbinary and gender nonconforming persons; children; the elderly; those who are Black, Indigenous and/or people of color; and persons with disabilities are often at greater risk of harassment, including sexual harassment and assault.

In most cases, these practices and the model policy they guide focus on forms of harassment other than physical or sexual abuse and/or assault, although some cases of harassment may ultimately escalate to become such cases. While there may be a variety of responses to harassment which appropriately redress harm and maintain community bonds, there is never any excuse for, nor should there be toleration for, abuse or assault.[(5)]

As a Church body, we have learned through hard experience that ignoring harassment within the body of Christ will not make it go away - it simply reduces the Church's capacity to witness to God's transforming love. Policies and practices are not a magic wand; they cannot substitute for an authentic culture of mutual care for one another, nor for the caring responses needed when harassment occurs. However, their implementation often helps communities to become and remain more spiritually healthy and to reduce the occurrence of harassment.

Spiritual Call to Action

> Then God said, "Let us make humankind in our image, according to our likeness…." So God created humankind in his image, in the image of God he created them.
> *Genesis 1:26a, 27a*

Every person is made in the image of God. This reality undergirds everything we do as the people of God, especially when it comes to how we treat one another. All our words and actions - as individuals, as communities, and as a whole Church - must therefore be informed by this truth. We seek always to honor the divine image in one another and in ourselves through our words and actions. When we fail to do so, we hurt one another and we obscure God's image in ourselves.

When Jesus highlighted the commandments to love God with all we are and have and to love our neighbors as ourselves,[6] he reinforced for us that link. We cannot honor God and hurt our sibling;[7] we cannot harm our sibling and hope to escape unscathed ourselves.[8]

When we are received into the household of God through baptism, these bonds are sealed in a new way. We promise to respect the dignity of every human being, to seek and serve Christ in each other, and to strive for justice and peace among all people.[9] These promises do not leave room for us to harass or intimidate or retaliate against one another, nor do they permit us to stand by silently when others do these things. All of us, lay and ordained, are equally bound by these promises. All forms of harassment, aggressive pressure or intimidation, persecution, force, coercion, and molestation are violations of our baptismal vows.

At the same time, our understanding of God's command to love one another is formed by the people around us. In particular, our race, ethnicity, and culture affect what we perceive to be harassment in ways we may not always be aware of. A firm tone of voice may be considered appropriate and respectful in one cultural context yet feel aggressive to someone from another context. Avoiding eye contact may be experienced as respectful by one person or a sign of mistrust by another. It is crucial that our conversations about how to respect the dignity of each person include voices from a range of cultural perspectives as we set the tone for what we consider "appropriate" in our settings. We must take into account the full range of power differences in a situation and prioritize safety first and comfort second as we seek to live out our love and respect for one another.

The image of God within each of us and the promises we make to God and one another in baptism call us to be better. When we become aware of situations that obscure God's image in ourselves, in members of our communities, and in those we serve, we are compelled to act on that awareness.

The Legal and Ecclesiastical Position

> Almighty God, whose loving hand has given us all that we possess: Grant us grace that we may honor you with our substance, and, remembering the account which we must one day give, may be faithful stewards of your bounty, through Jesus Christ our Lord. Amen.
> *For the Right Use of God's Gifts, Book of Common Prayer, p. 827*

Although no comprehensive policy yet exists outlining general expectations for how all church members and others in church settings treat each other, several existing church policies do address various types of improper conduct in our Episcopal communities.

Such policies include but are not limited to:

- Title III on Ministry and especially Canon III.1 on Lay Ministry.
- Title IV on Ecclesiastical Discipline for ordained ministers.
- Model Policies for the Protection of Children, Youth and Vulnerable Adults.
- Anti-Racism Training.
- Canons prohibiting discrimination against members and employees of the church as well as in the discernment process for ordination on the basis of race, color, ethnic origin, national origin, marital or family status (including pregnancy or child care plans), sex, sexual orientation, gender identity and expression, disabilities or age.
- Charter for the Safety of People within the Churches of the Anglican Communion.

These may have implications for a faithful response to harassment (sexual and otherwise).

Harassment may be understood as a form of discrimination, and thus definitions of harassment are often part of laws against discrimination. Secular laws against discrimination vary by region and country, and, in the United States, by state. Because TEC exists throughout the United States and in 16 other countries in several very different regions of the world, no single definition of harassment is likely to be helpful in ensuring that all people are treated with dignity and respect in all parts of the church. Still, some of the characteristics of harassment deemed illegal in different parts of the world may include:

- Certain forms of unequal treatment or bullying.
- Verbal, physical, or sexual conduct, when unwelcome.
- Unwelcome behavior motivated by a person's actual or perceived sex, sexual orientation, gender identity/expression, race/ethnicity, age, ability, or physical appearance or background.
- Behavior that creates/has the purpose of creating hostility, intimidation, humiliation or offense.
- Making a person's employment or role within the organization conditional on their acceptance of certain unwelcome conduct.

Although all Christians have made a commitment to love our neighbors as ourselves, only clergy are currently subject to discipline under the canons for violations of these promises. Although some parish bylaws and diocesan canons provide for the removal of lay leaders (especially wardens and vestry members) from ministry leadership positions, no churchwide policies provide for discipline when a lay person harasses another person (lay or ordained). Parishes, dioceses, and other church organizations that have relevant policies can use these as guides as they adapt the sample policies and best practices to the particular contexts of their communities.

In some cases, actions by individuals in the Church may give rise to secular lawsuits. It may also be necessary for the Church to involve the police or other secular legal authorities and support the prosecution of, or other legal action against, the harasser. In these and all harassment situations, the church has a responsibility to provide for the entire community's sense of safety as they consider the harasser's participation in the life of the church. When police or other secular authorities become involved, this is likely to increase the trauma some members of the community experience. Such involvement may also lead to a harasser escalating the unwanted behavior. Care should therefore be taken to engage law enforcement officers only when necessary, when doing so is required by law, and with the goal of preventing and/or ending harm. Questions about whether or how to involve secular legal authorities should never turn on considerations of liability alone or minimization or denial of problems. It is vital for institutional leaders to take all allegations of harassment seriously so that prompt and supportive action can be taken for the well-being of all in the community.

How Can Congregations, Dioceses, and other Church Organizations Help to Prevent and Respond to Harassment?

> You... were called to be free. But do not use your freedom to indulge the flesh; rather, serve one another humbly in love. For the entire law is fulfilled in keeping this one command: "Love your neighbor as yourself."
> *Galatians 5:13-14, CEB*

The freedom for which Christ has set us free is the freedom to love actively: to grow in community with God and with one another in order that the whole body of Christ might flourish. But as the apostle Paul taught, often we do not do the good we want to do; instead, we do the very thing we mean to avoid. When that happens, our communities - whether congregations, dioceses, schools, or other groups - can help us reorient ourselves toward that love which respects the dignity of every person, so that we can choose the good next time.

Even before your group has established a formal policy for preventing and responding to harassment, you can begin to set standards about how you intend to treat each other, whether in physical space or digital space. These standards should be modeled by ordained and lay staff and leadership. Consider especially the following norms:

Make seeking consent a part of everything you do. It might feel odd at first to ask, "May I sit here?" "Can I give you a high five or a hug?" or "Would you like help carrying that?" and to hear "No thank you" as easily as "Yes, please". But the more we make it a habit in all our interactions, from greeting a small child to comforting the bereaved, the less we will have to work to remember it in situations that might otherwise feel sexualized, and the more we will honor God's image in one another and in ourselves.

If a person says, "This is upsetting to me," practice taking that seriously, no matter how innocently the original comment or action was meant. (Keep in mind that the most important priority is everyone's safety and basic human dignity - not protection from uncomfortable truths. Sometimes we feel upset because we have been wronged, and sometimes we feel upset because someone has asked us to acknowledge that we have done wrong. Taking the moment seriously means taking the context seriously as well.) When we make it a habit to stop, listen, and adjust our behavior even in the little hurts, it's easier to avoid hurting each other in bigger ways. It also makes us more likely to respond well when we do hurt each other in bigger ways.

Practice letting go of opinions about other people's bodies. When we learn not to worry about how other people dress their bodies, how big or small those bodies are, how people manage what their bodies can or cannot do, etc., we don't have to worry about whether our comments about their bodies will be received the way we meant them.

Consider your group's culture of ritual touch in addition to everyday touch. For instance, how do/could/will moments such as the passing of the peace truly honor the dignity of and divine image in each person, as they were created to do?

Focus on building Christian relationships of mutual accountability grounded in God's call and love. Commit to telling the truth about yourselves and others and be honest about harm done by and to you. Practice receiving others' apologies with compassion rather than shaming them or minimizing the impact. Teach and model confession, lament, intercessory prayer, and making amends as key ingredients to building accountable Christian communities.

Our good intentions are easier to live out when our communities have agreed on what it looks like to love one another honestly and serve one another humbly. In addition to being intentional with our informal community norms, formal anti-harassment policies help us clarify our vision and standards for our community and give us a path forward when harassment does occur. You will find several examples of anti-harassment policies at www.episcopalchurch.org/safe-church. One or more may provide a useful template for your own group.

Whether you begin from a template or from scratch, don't go it alone. Your policy will better reflect your community and have more authority among your members if the group that creates it includes clergy, staff, and lay members who represent the diversity of your particular community. Recognize as you invite these individuals that members of vulnerable communities must be part of the work if it is to reflect their needs and their past experiences of harassment. Recognize also that many of these individuals are frequently asked to give the Church the benefit of their labor and experience and consider compensating them for this work if you are able to do so. If your local context includes intentional communities and/or community organizing networks, you may find these to be valuable resources as well.

Keep in mind that ordained and lay staff, volunteers, and members may all experience or witness harassment. Anyone may also harass, either intentionally or unintentionally. Therefore, your policy will need to provide all members of the community with options for responding if they do experience or witness harassment, as well as help everyone to understand how behavior may be experienced as harassing so they can avoid it. The more representative your group is, the more effective your policy will be at accounting for the variety of situations you may encounter.

Here are some other important considerations to take as you create your own anti-harassment policy:

Take a “bystander intervention” approach

As the church, non-profit, and corporate worlds alike have incorporated more policies and trainings to improve workplace safety and inclusion, we have learned a bit about what works and what doesn’t. Most of us don’t just want the environments around us to be safe for us - we want them to be safe for everyone! Yet we can find ourselves getting resentful when trainings and policies seem to assume we are behaving badly and need to be kept under control.

The most effective way to help transform your culture is to assume that most people in your church, diocese, school, or organization mean well and want to help make a safe environment. Approach your policy writing, follow-up communications, and training from this perspective. Commit to supporting one another in becoming an accountable community where members speak and receive the truth about harm that is done. Teach people how to seek help, how to apologize, and how to make appropriate amends. Teach them what to watch for, how to intervene, and how to support those who have been harassed. The more you treat people like they’re on the team, the more likely it is they’ll act like they’re on the team.

Plan how you will respond when harassment occurs

Your policy should include a plan for ensuring that its goals and promises can be lived out. Identify a process for how to report a violation as well as what steps should be taken once it is reported. Include what interim steps you might take while the report is investigated, in order to ensure a sense of safety for those involved. Commit to seeing your process through and know whose responsibility it is to oversee which steps.

As a Church, we minister in hundreds of different cultural and legal contexts. It would be impossible to craft a detailed, “one-size-fits-all” response to harassment across all these contexts; however, there are a number of things you will need to consider as you plan your local policy:

What is the reality of your context? Are you highly resourced? Is your system based on one person doing everything? Does everyone know each other? How is the reality of your context both a blessing and a drawback? How will that impact what it looks like to follow up and monitor complaints in your community?

In particular, what resources are available in your local community to help you respond to harassment? While the police may be needed for things like filing reports, learn about who else in your community can help instead or as well. Mental and behavioral health professionals, county social service agencies, local transformative justice groups, and community advocacy and support organizations may be able to provide training and consultation.

Most people who experience harassment simply want the behavior to stop. While we want our policies and their enforcement to be rigorously fair, it's important to take into account the unique details of each situation. Some situations call for disciplinary action beyond a change of behavior; others do not. Remember that our goal is to be both fair and sensitive at the same time, to treat all with dignity and respect and to create a pathway to relationship in community for the one who has done harm, if they are willing to take accountability.

- Provide compassionate care for the person making the complaint of harassment.
- Listen to the complainant's description of what happened and ask what they want done.
- Work for the best solution for the person(s) who have been harmed, prioritizing their self-determination whenever possible.
- Mutually agree on a Pastoral Care Partner for the complainant. This PCP will walk with the complainant through the rest of the process.
- Mutually agree on a Pastoral Care Partner for the accused. This PCP will walk with the accused through the rest of the process.
- Follow the laws and policies of your location.
- Keep the matter as confidential as possible, without diminishing the complainant's agency or ability to appropriately function.
- Make a plan for the safety of the community.
- Deal with the situation in a timely manner, while staying in regular communication with the persons most directly involved.
- Keep the complainant's sense of safety as a primary concern as you explore options for resolution.
- Follow up periodically with the complainant after the initial resolution. Address any retaliation, whether direct (such as removing someone from a committee or job) or indirect (such as being treated coolly by members of the congregation).
- Don't force reconciliation. Keep in mind that interpersonal relationships are messy and there may be many faithful outcomes for any given situation.
- Include a resource page for those who may have experienced harassment as well as one for those who have been accused of harassment. (Samples of such a resource can be found in Appendix B of this document.)
- Identify who should respond to allegations of harassment

Choosing who will respond is a matter that requires particular care and consideration. You will need to identify who can begin in this role immediately, and also whether this person or team will be your best long-term solution. In most cases, the best long-term answer to this question is to form or connect with an ombuds team or office. However, as this is a relatively recent approach to resolving instances of sexual harassment, most congregations, dioceses, and other Episcopal groups and organizations will not immediately have access to this model.

In the meantime, consider who in your sphere might match the following description.

An effective intake person will be:

- Trusted by all constituencies. They must have the trust of the bishop/rector/senior leadership, as well as of those who have the least power and authority in your group (visitors, new members, students, employees, etc.). They must also have the trust of those who will offer counsel to the harassed (staff, teachers, lead volunteers, camp counselors, etc.) so that they will recommend speaking with the intake person.
- A bridge builder. They must work with all sorts of people in all sorts of situations and be able to help people come to common conclusions. They must be able to step outside of their own experience to have empathy with people of various backgrounds and identities.
- A problem solver. They must be a respectful listener so that they can help people find solutions appropriate to the situation instead of merely imposing a one-size-fits-all answer. They must be able to discern when an informal response is enough to stop the behavior, and when a formal process must be engaged. They should have a healthy approach to conflict and not be avoidant or over-fond of it.
- Equipped. They must have sufficient time to dedicate to this work, as well as clear policies and procedures to guide their responses. They and you should be clear about their role: are they to facilitate a consensus, make recommendations, or impose a final and binding obligation? They will likely also need ongoing emotional and spiritual support, especially if and when they have a relationship with any party to the complaint.
- Discreet. They must be able to keep strict confidentiality when required and refrain from public speculation or private gossip when strict confidentiality is not possible.
- Connected but independent. An intake coordinator will not be able to earn full trust if they are so caught up in the church systems that they cannot take the risk of saying something the senior leadership doesn’t want to hear. Nor will they be able to work effectively if they are so far outside that they do not understand how church systems operate. Ideally, they would also be conversant with canonical and legal standards as well as counseling practices.

Where might you find such a person? Unless you have the financial and human resources to hire an outside expert (and most of us won’t), you’ll likely need to find someone who can begin with the appropriate levels of trust and responsible character and learn the specific skills required for this role. In most circumstances, the best answer is to equip a team of at least two people, to maximize the possibility of trust and provide some collegiality and accountability for the intake coordinators themselves. Good candidates for the role might include:

- A lay person with outside training in this work (The fact that lay people do not vow obedience to the institution of the Church can be very helpful here.)
- A lay or clergy person with a previous counseling background
- A well-trusted, retired bishop of another diocese
- Someone on the staff of the parish/diocese/school/organization who is not the rector/bishop/senior leader

- Someone who has been a leader in a neighboring parish/diocese/organization but is outside the direct scope of your church or organization
- Someone without a formal role in your church or organization who has a high level of trust from all parties.

Finally, keep in mind that very few people trust any institution, including the Church, to respond well when harassment occurs. Your intake coordinator(s) will begin with a trust deficit to overcome. You can set the stage for easier trust building by gathering a small group of people who represent different stakeholders in your church or organization, and discerning together whom to appoint to this position, rather than having the rector/bishop/senior leader appoint them independently.

Communicate with the whole Body

Once you have identified what behaviors you expect from one another and how you will respond when people behave otherwise, it's time to share the plan with the whole community. Make your policy widely available, including on your website and in hard copy. Create a short summary version of your policy that can be posted in plain view and/or handed out regularly. (A model policy of this sort can be found in Appendix B of this document.)

Discuss it as a community. Make these expectations as much a part of your community’s care for each other as washing your hands. Have regular conversations with your ordained and lay staff and leadership about how your goals are being lived out and how your community can keep building on these goals.

Train leaders

While keeping people safe from harassment is the work of the whole community, your leaders bear particular responsibility for helping model this well and offering constructive correction where needed. Train your leaders regularly on what you expect from them and make confession, seeking forgiveness, and making amends a regular part of your life together.[10]

Appendix A: Examples of harassing behavior, possible remedies, and potential consequences

Examples of harassing behavior

This list of behaviors is not exhaustive, but gives a clear indication of the types of actions that constitute harassment:

- consistently attacking someone’s professional or personal standing
- attempting to make someone appear incompetent
- deliberate sabotage of a person’s work or actions
- public or private displays of offensive material
- use of emails or texts to harass or insult, sent either to the individual or to third parties
- spreading malicious rumors to third parties
- public humiliation by constant innuendo, belittling and ‘putting down’
- personal or aggressive insults
- aggressive gestures, verbal threats and intimidation
- unwanted physical contact
- talking/shouting directly into someone’s face
- direct physical intimidation, violence or assault
- persistent threats to a person’s security

Examples of sexual harassment

The following describes some of the types of acts that may be sexual harassment:

- Touching, pinching, patting, grabbing, poking or brushing against another person’s body
- Rape, sexual battery, molestation or attempts to commit these assaults
- Prolonged handshakes or hugs, including ritual greetings such as the passing of the peace
- Requests for sexual favors, including those accompanied by implied or overt threats. Such threats may include job performance evaluations, promotions or pay, access to volunteer roles, or personal safety;
- Subtle or obvious pressure for unwelcome sexual activities
- Unwanted expressions of sexual attraction, especially repeated expressions
- Sexually-oriented gestures, noises, remarks, jokes or comments about a person’s sexuality or sexual experience, which create a hostile, uncomfortable environment
- Sexually-oriented displays or publications, such as pictures, posters, calendars, graffiti, objects, promotional material, reading materials, or other materials that are sexually demeaning or pornographic. This includes such displays on church-owned or church-operated computers or cell phones and sharing any such displays while in the church context.

- Overly generous gifts or gifts of a sexual, intimate nature.
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity, and the status of being transgender, such as:
    - Interfering with, destroying or damaging a person's workstation, tools or equipment;
    - Sabotaging an individual's work;
    - Bullying, yelling, slurs;
    - Requesting or demanding intimate information, such as information about someone's genitalia, medical procedures, or sexual activities.

Examples of Remedial Measures for Clergy Who are Aggressors

- Title IV;
- Recommend peer support group;
- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;
- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Requiring restitution and/or restoration of Complainant to prior position.

Examples of Remedial Measures for Lay Staff Aggressor

- Recommend peer support group;
- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;
- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Requiring restitution and/or restoration of Complainant to prior position.
- Termination.

Examples of Remedial Measures for Wardens and Vestry Members who are the Aggressor

- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;

- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Requiring restitution and/or restoration of Complainant to prior position.
- Recommendation for resignation.
- Removal from position

Examples of Remedial Measures for Lay People who are the Aggressor and not office-holders

- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;
- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Removal from the Community, short or long term.

Examples of Consequences for Clergy

- Referral of the matter to the Ecclesiastical Disciplinary System (Title IV);
- A letter to the personnel file;
- Legal action;
- A Pastoral Directive that could include requirements for training, counseling, etc.

Examples of Consequences Lay Staff

- Letter of reprimand;
- Probation;
- Salary freeze;
- Temporary removal from duties;
- Legal action;
- Suspension with or without pay; and
- Termination.

Example of Consequences for Wardens or Vestry Members

- Counseling or related services;
- A request for resignation;
- Removal of warden or vestry member, and
- Legal action.

Examples of Consequences for Lay People who aren't office-holders

- Counseling or related services;
- Participation contingent on changed behavior
- Requirement to limit participation
- Removal of participation

Examples of Support for Clergy Subjects of Harassment

- Pastoral Support from an appropriate source
- Development of a recommended protection/ safety plan
- Expectation that the needs and comfort of the target of the harassment take precedence
- Congregational leadership involvement that includes lay and clergy
- Possible changes could include physical environment; work schedules; ministry oversight responsibilities
- Regular check-in
- Open to modification
- Counseling
- Documentation of incident, response, and follow-up
- Furlough or other leave at full pay

Examples of Support for Staff Subjects of Harassment

- Pastoral Support from an appropriate source
- Development of a recommended protection/ safety plan
- Expectation that the needs and comfort of the target of the harassment take precedence
- Congregational leadership involvement that includes lay and clergy
- Possible changes could include physical environment; work schedules; ministry oversight responsibilities
- Regular check-in
- Open to modification
- Counseling
- Documentation of incident, response, and follow-up
- Furlough or other leave at full pay

Examples of Support for Wardens and Vestry persons Subject of Bullying

- Pastoral Support from an appropriate source
- Development of a recommended protection/ safety plan

- Expectation that the needs and comfort of the target of the harassment take precedence
- Congregational leadership involvement that includes lay and clergy
- Possible changes could include physical environment; work schedules; ministry oversight responsibilities
- Regular check-in
- Open to modification
- Counseling
- Documentation of incident, response, and follow-up

Appendix B: Sample resources for persons directly involved

I think I have been the Subject of Harassment. What can I do?

If you think you've been harassed, you might feel afraid that no one will believe you. You might wonder if what you are experiencing is harassment or if you are making too much out of the experience. You might even blame yourself. These are common responses, but you are not to blame for any harassment. You are not responsible for determining whether what you are experiencing is harassment or for addressing it. You deserve to be believed and you do not need to go through this alone. The Church is charged with keeping all members safe from such behavior and has chosen and equipped intake coordinators to receive your report and offer you the support you deserve.

Harassment often starts subtly and becomes more severe over time. Those who harass others are unlikely to stop unless they are confronted. If they are challenged early, though, it is often possible to stop the behavior using informal means. So, if you do not feel physically threatened, make a report to the intake coordinator identified by your organization as soon as you are able.

Your report should include a record of all experiences of harassment. Document as much of the following as possible:

- Date, time, and place of incident
- Nature of incident: with as much detail as possible, tell what happened and its effect on you
- Name/ contact information of witnesses and any additional information they have, including other targets of the harasser
- Any action you, the harasser, or others have taken, including spoken or written conversation(s) about the incident
- Emails, text, voice messages, or any other communications that relate to the incident
- Anything else that helps develop a fuller picture of the situation

If there are gaps in your memory, record as much as you know. This information may be needed as evidence.

Do not meet with or confront the harasser alone.

It is never too late to ask for help. If you have been harassed, you deserve and will receive support.

If you do feel that your physical safety may be in danger, trust your judgment. Your intake coordinator will help you access the services you need to be safe. Besides the police, these might include support resources inside and outside your Episcopal community.

I have been accused of Harassment. What can I do?

As part of the Church's work to keep all members safe from harassment, all such complaints must be followed up and investigated. If you are accused of harassment, you will have a chance to respond to the accusation. However, simply denying there is a problem or insisting that the problem lies with the Complainant will not be a sufficient response. Your church, diocese, or organization has identified and equipped intake coordinators and others who will listen to your experience of the incident(s) and offer you the appropriate support and guidance.

If you have been accused of harassment, do not seek to meet with the complainant alone and do not agree to do so if asked.

Do contact the appropriate intake coordinator as soon as possible. They will meet with you privately to talk through the situation. They will listen to you fully and will take all relevant information into account. They may discuss constructive response options with you.

Sometimes, the problem can be resolved informally through discussion with the intake coordinator. It is possible that you did not realize the impact your behavior or words have had on others, in which case becoming aware of this and acting or speaking differently may redress the problem. In other instances, further work and a more formal process may be needed. You might be offered professional help to recognize, understand, and change your behavior. In some situations, a refusal to accept this help could result in corrective action, loss of ministry leadership or participation, or even legal action taken against you.

If you are a clergyperson accused of harassment, a formal complaint might be lodged against you and there may be consideration of whether the matter constitutes misconduct under Title IV of the canons.

Throughout all formal or informal responses to harassment accusations, the primary objective is to identify the underlying issues and fully eliminate the cause(s) of offense in a timely manner and without retribution.

Appendix C: Model Anti-Harassment Policy for posting or distribution

This document provides a model for a short summary policy that can easily be posted in plain view and/or handed out. It should not be used as a substitute for creating a robust policy specific to your context with detailed information on how to prevent and respond to harassment.

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Model Anti-Harassment Policy

It is the policy of The Episcopal Church to provide and maintain our environments free from harassment of any kind as part of our Baptismal commitment to respect the dignity of every human being. Additionally, it is important that we fully comply with all applicable laws in creating healthy working environments. Harassment undermines the integrity of our relationships and negatively impacts the morale and productivity of all who participate in the life of The Episcopal Church.

It is prohibited for any employee, supervisor, volunteer, member, visitor, or program participant (whether clergy or lay) to harass another employee, supervisor, volunteer, member, visitor, or program participant (whether clergy or lay) during working or non-working hours, on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, or marital status.

Harassing Conduct

Harassment is unwelcome conduct toward an individual on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, marital status, or any legally protected status, any time the conduct creates an intimidating, hostile, or offensive environment. Examples of harassment that may violate this policy include, but are not limited to: [11]

- Oral, written, or electronic communications that contain slurs, negative stereotyping, offensive jokes, insults, or threats. This includes comments or jokes that are dismissive of human dignity or targeted at individuals or groups based on attributes listed above.
- Nonverbal conduct, such as leering and giving inappropriate gifts.
- Physical conduct, such as assault or unwanted touching.
- Visual images, such as derogatory or offensive pictures, cartoons, drawings or gestures. Such prohibited images include those in hard copy or electronic form.
- Expressed or implied demands for favors in exchange for some benefit (e.g., a promotion, a leadership role) or to avoid some detriment (e.g., termination, removed financial support for a pet project)

Sexual harassment

Sexual harassment means unwelcome sexual advances, unwelcome requests for sexual favors, unwelcome physical contact of a sexual nature, or unwelcome verbal or physical conduct of a sexual nature.

Sexual harassment includes conduct directed by a person at another person of the same or another gender. Unwelcome verbal or physical conduct of a sexual nature includes, but is not limited to, the deliberate, repeated making of unsolicited gestures or comments of a sexual nature; the deliberate, repeated display of offensive sexually graphic materials; or deliberate verbal or physical conduct of a sexual nature, whether or not repeated, that is sufficiently severe to interfere substantially within a ministry context and/or an employee's work performance or to create an intimidating, hostile or offensive environment.

Behavior that respects dignity and difference

Our goal is to have an environment where we all treat each other respectfully. Any behavior that does not respect a person's dignity, even if it does not rise to the level of "harassment," interferes with that goal. Episcopal Church leaders at all levels and in all contexts are encouraged, as part of setting and maintaining an appropriate tone, to respond to behavior that falls short of this goal, even where no one has complained or indicated they have been offended.

How to report a violation

Do not assume that your supervisor, clergyperson, or ministry leader is aware of the problem. We need you to bring your complaints and concerns to our attention so that we can help resolve them. When concerns and complaints arise, document them. If you wish to report your concerns, bring them to the designated response person, if your ministry context has one, or else to your immediate supervisor or ministry leader. (If your immediate supervisor or ministry leader is the harasser, you should bring your concerns to their supervisor if they have one, or to another leader in the community.)

Investigation and response

When you report a complaint of harassment or inappropriate behavior, your complaint will be investigated. Where there has been a violation of policy, appropriate action will be taken to resolve problems and avoid future violations. In appropriate cases, disciplinary action (including potential termination of employment or leadership responsibilities) may be taken against those violating the Anti-Harassment Policy. You can expect to be informed periodically about the status of your complaint.

Leadership responsibility

While building a culture of respect and appropriate behavior is work that belongs to the whole community, it is the responsibility of senior lay and clergy leadership to ensure an environment free of harassment and inappropriate behavior and that complaints are handled promptly and effectively. Leadership with personnel responsibilities must: inform their employees, clergy, supervisors, volunteers, and members about this policy (including posting this policy in an easily visible location); specify a person to hear complaints; promptly investigate allegations of harassment; take appropriate action (including disciplinary action); and take steps to prevent retaliation.

Retaliation is prohibited

This policy strictly prohibits any retaliation against any person who reports a concern about harassment or other inappropriate behavior or participates in an investigation of a violation of this policy. To help avoid retaliation, senior leadership shall make an earnest effort to facilitate repentance and repair within the affected community.

Endnotes

(1) Genesis 1:18, Common English Bible.

(2) Members of the committee gathered data informally from lay and ordained members throughout the Church, including their own experiences of systemic sexism, misogyny, misuse of power, sexual harassment, exploitation, and violence in the Church 9and other employment and institutional settings). Although other denominations, including the United Methodist Church, have gathered official data on these issues within their denomination, and these reports informed the special committee's work, TEC has not conducted a formal, denomination-wide study. A report of the special committee's work was not included in the Blue Book for the 79th General Convention but may be found on-line at https://extranet.generalconvention.org/staff/files/download/22107 . In addition, a summary of the committee's work and resulting resolutions may be found on-line at https://houseofdeputies.org/2018/10/06/special-committee-on-sexual-harassment-and-exploitation-legislation/

(3) A more detailed list of example behaviors is included in Appendix A.

(4) These may include but are not limited to: ability, gender, race, wealth and status, relative size, familiarity with the space or community, or education level.

(5) Whatever other actions the church takes in such cases, the church should always work primarily to assure safety for those who have been assaulted. Church members and officials should cooperate as needed with secular legal authorities to take appropriate action against the assault perpetrator while continuing to provide pastoral and community support for the victim. In situations in which the church also engages in its own disciplinary processes, these should not be used to hinder or interfere with secular criminal processes.

(6) Matthew 22:34-40

(7) 1 John 4:20

(8) 1 Corinthians 12:12-27

(9) BCP p. 305

(10) At the time of writing, TEC does not offer anti-harassment training directly; however, preliminary anti-harassment training materials are currently being created by our Safe Church Training vendor to reflect the guidelines outlined in this guide.

(11) A more detailed list of example behaviors is included in Appendix A.

TASK FORCE TO RESPOND TO THE OPIOID EPIDEMIC

Membership

The Rev. Dina van Klaveren, *Chair*	Maryland, III	2021
The Rev. Amanda Kotval, *Vice-Chair*	Virginia, III	2021
Dr. Donna Barten	Western Massachusetts, I	2021
The Rev. Debra Bennett	Ohio, V	2021
The Rev. Jan M. Brown	Southern Virginia, III	2021
Ms. Amy Cochran	Southern Ohio, V	2021
The Rev. Canon Katherine Harrigan	Central Pennsylvania, III	2021
The Rt. Rev. William Klusmeyer	West Virginia, III	2021
The Rev. Dr. Benjamin Nelson	West Texas, VII	2021
The Rt. Rev. Jake Owensby	Western Louisiana, VII	2021
Mr. Merrick Williams	Long Island, II	2021
Ms. Twyla Wilson	North Carolina, IV	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Acknowledgements

We give thanks to Robert Evans and Susan Beares for the administrative support contributed to this Task Force. We also appreciate the support of Patrick Haizel, Brian Murray, and Jennifer Gonzalez in the Executive Office of the General Convention. We appreciate the guidance of Lisa Webb in the Office of Communications and Nancy Davidge in the Public Affairs Office. We are grateful for the work of Jack Cobb at Episcopal Public Policy Network in promoting the CARES act, which supported an expansion of and increased funding for treatment of substance use disorders.

Mandate

2018-C037 Call to Respond to Opioid Epidemic

Resolved, the House of Deputies concurring, That the 79th General Convention call all dioceses and parishes in The Episcopal Church to respond to the opioid epidemic with training, pastoral care, advocacy, and liturgy; and be it further

Resolved, That dioceses and parishes be urged to: partner with First Responders and others in the medical community to host trainings on how to administer naloxone in the event of an overdose; partner with other faith communities and recovery programs in their local contexts to offer pastoral care to those affected by this epidemic; partner with other faith leaders to advocate with local and state government regarding policies and laws to promote healing and wholeness for those affected by this epidemic; and be it further

Resolved, That the 79th General Convention direct the Office of Government Relations of The Episcopal Church to advocate for the federal government of the United States to address this as public health crisis, affirming that opioid use disorder is a disease, which needs adequate resources for treatment options; and be it further

Resolved, That the 79th General Convention direct the Standing Commission on Liturgy and Music to develop additional liturgical resources to address the needs and concerns of those whose lives have been profoundly affected by this epidemic; and be it further

Resolved, That the 79th General Convention concurrently acknowledge the purpose and value of prescription opioid medications in appropriately treating chronic, intractable, pain; or acute pain resulting from curable, short-term medical conditions; and affirm the work of the medical community to create established medical guidelines supporting people living with pain; and call all dioceses and parishes in The Episcopal Church to partner with the medical community and health nonprofit organizations to understand the realities, risks, and barriers to access to care and effective treatments and cures for people living with chronic conditions and otherwise untreated or undertreated pain; and be it further

Resolved, that the Church recognize that issues of substance use disorders, access to diagnosis and effective treatment, and lack of appropriate treatment for untreated or undertreated pain affect all communities, but especially those marginalized in poverty, racial, gender, and ethnic discrimination, persons with disabilities, and other minority communities; and be it further

Resolved, that congregations be urged to include in the Prayers of the People intercessions for patients, families, and communities affected by substance use disorders and also by untreated and undertreated pain and chronic diseases; and be it further

Resolved, That the 79th General Convention to authorize the Presiding Officers to create a task force to assist in the curation and creation of resources for education, prevention, pastoral care, recovery, advocacy, and partnering with community organizations to be use by dioceses and parishes for the purpose of responding to the opioid epidemic and substance use disorders; and be it further

Resolved, That the membership of this task force will be appointed by the Presiding Officers and consist of no fewer than 8 nor more than 14 members; and that the task force be made up of bishops, priests, deacons, and laity; and be it further

Resolved, That the task force will complete this work within two years.

Summary of Work

Meeting Summary

The task force convened its first meeting on May 2, 2019 via Zoom. Work began on the primary set of tasks related to the mandate: "to assist in the curation and creation of resources for education, prevention, pastoral care, recovery, advocacy, and partnering with community organizations to be used by dioceses and parishes for the purpose of responding to the opioid epidemic and substance use disorders..." We identified related tasks and decided to conduct a survey to better understand the needs of clergy and lay leaders regarding education, prevention, pastoral care, recovery, advocacy, and partnering with community organizations. We met again on June 4 and October 3, 2019 to work on resource curation and creation. We determined we would benefit from an in-person work session, and the General Convention office arranged a meeting for us at the Maritime Center in Linthicum, Maryland, on November 5-7, 2019. The website was in process and being updated with relevant resources at the in-person meeting, and the task force continued to meet in small groups on survey analysis and resource collection, curation, and creation.

The meeting scheduled for March 18, 2020, was rescheduled due to COVID-19. The task force met on April 28, 2020, to check in on one another and to share updates about changes in recovery ministries and partnerships due to the pandemic. After a pandemic hiatus, the task force reconvened on November 30th to focus on the following tasks for the coming three months: understand how the COVID-19 pandemic has impacted recovery ministry; continue resource work on the website; complete survey analysis; and draft a resolution for General Convention.

A Plan to Provide Critical Resources

The task force decided on a two-fold approach to the work of the mandate. First, a survey would be conducted with the assistance of the GCO to determine what kind of resources are needed by local congregations and other ministries. Second, a website featuring existing resources curated and organized in easy-to-find categories would be developed and publicized.

Survey Results

The survey was released on October 30, 2019. 527 surveys were returned, including 520 in English, five in Spanish, and two in French. The survey results confirmed and directed efforts to curate and create useful resources on the website, which was the bulk of task force work during the November 5-7, 2019 in-person meeting.

Survey respondents expressed deep concern for individuals and families facing substance use disorder involving opioids/heroin. Many assessed their access to resources as lacking and were eager to utilize resources for education and prevention, especially for children, youth, and families. Respondents identified related issues such as unemployment, violence, homelessness, incarceration, and access to medical care in their communities and seek practical tools from the Church in creating partnerships to transform lives, communities, and systems. Several existing key partnerships and programs throughout the Episcopal Church were identified through the survey, including harm reduction strategies, 501(c)3 recovery centers, liturgical resources, and support strategies for families affected by opioid/heroin use.

The task force appointed a member to follow up with respondents with ministry partnerships and programs to share with the wider Church. These ministries will be highlighted on the website as examples for dioceses and congregations seeking ideas for a ministry of caring and transformational response in the face of the opioid/heroin epidemic.

Website Content Curation

The task force decided early on that the best way to assemble and distribute current resources would be through a website that could be shared across parishes and dioceses. A website would also allow for ease of updating as needed, without the expense of printing or mailing. At the November 2019 meeting, the task force worked together to find online resources for each area the mandate addresses, including the addition of resources to help find treatment in individual localities. These resources were added to the website, which can be accessed at: https://sites.google.com/view/opioid-task-force

At the meeting in November 2020, the task force also noted a need to provide resources on how the opioid/heroin epidemics affect people and communities of color, as well as how the work of responding to these crises has changed since the arrival of the COVID-19 pandemic. These resources are to be added to the website.

Remaining Work

The website content is still in progress. The task force looks forward to completing this work by April 1, 2021 and releasing a press release about the survey results and the website's critical content and availability. The task force also plans to submit a resolution to the next General Convention in regard to promoting the resources via diocesan websites, encouraging Recovery Ally Training for clergy and lay leaders throughout the Church, maintaining the resources that were curated and created by this task force so that the resources continue to save lives, reducing stigma/discrimination, and supporting families/communities.

Proposed resolutions

A090 Allies for Recovery in the Episcopal Church

Resolved, the House of _______ concurring, That the 80th General Convention urge all dioceses and parishes in The Episcopal Church to include www.generalconvention.org/sites/opioid-task-force on websites and encourage training, advocacy, and pastoral care resources for individuals, families, and communities affected by opioid addiction; and be it further

Resolved, that dioceses and parishes designate persons within their region to be trained as Recovery Allies, encourage Naloxone training for members, and disseminate the SAMSHA Toolkit (available on website) to clergy and lay leaders; and be it further

Resolved, that the 80th General Convention direct the Office of Government Relations of The Episcopal Church to continue advocacy for the federal government of the United States to address this as public health crisis, affirming that opioid use disorder is a disease, which needs adequate resources for treatment options; and be it further

Resolved, that the Church recognize that issues of substance use disorders, access to diagnosis and effective treatment, and lack of appropriate treatment for untreated or undertreated pain affect all communities, and there is a disproportionate effect on persons of color, persons with disabilities, and those affected by poverty; and be it further

Resolved, that congregations be urged to pray weekly during the Prayers of the People for those affected by substance use disorders and their families; and be it further

Resolved, that the General Convention designate an existing office to oversee website management, partner with seminaries and other organizations for Recovery Ally training, and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of $40,000 for implementation of this resolution.

EXPLANATION

The 2018-C037 Task Force on Responding to the Opioid Epidemic met over the course of 2.5 years to create resources, explore best ways for dioceses and parishes to respond pastorally and as advocates for recovery, and to conduct a survey of response needs throughout the church. Based on the survey, research, and meetings of the task force members, there is a need for useful science-based strategies for combating the disease of addiction in communities. As many survey respondents noted a need for resources and training to better support the recovery needs in their communities, the Task Force curated resources and encouraged those engaged in Ally Training opportunities. Seabury Seminary is offering an online Recovery Ally Training in the Spring of 2021, and the Task Force encourages similar offerings throughout the Church. Additionally, the Task Force encourages all congregations to include intercessions for those in recovery as a part of weekly worship to eliminate stigma and create safe space for families and individuals in recovery.

The following steps are recommended for continuing a robust response to the epidemic of opioid addiction:

(i) all diocesan and parish websites contain a link to the website created by the task force: www.generalconvention.org/sites/opioid-task-force ,

(ii) the management of the website and the administration of Recovery Ally Training be designated to existing offices or standing committees,

(iii) resources be allotted to the offices or standing committees designated with the task of maintaining the website and administering the training.

Much of the work of this Task Force was completed before the COVID-19 pandemic. The public health crisis has intensified the effects of opioid addiction and these recommendations are even more critical as communities face the trauma of loss and seek to care for our siblings in active addiction or in recovery.

TASK FORCE TO STUDY SEXISM IN THE EPISCOPAL CHURCH & DEVELOP ANTI-SEXISM TRAINING

Membership

Ms. Laura Russell, *Chair*	Newark, II	2021
The Rt. Rev. J. Scott Mayer, *Vice-Chair*	Northwest Texas, VII	2021
The Rev. Dr. Helen Svoboda-Barber, *Secretary*	North Carolina, IV	2021
The Rt. Rev. Mark Beckwith	Newark, II	2021
The Rev. Brooks Cato	Central New York, II	2021
Dr. John Harris	Oklahoma, VII	2021
The Rev. Spencer Hatcher	Maryland, III	2021
The Rt. Rev. Michael Buerkel Hunn	Rio Grande, VII	2021
The Rev. Tracy Johnson Russell	Connecticut, I	2021
Dr. Katherine Karr-Cornejo	Spokane, VIII	2021
Dr. Alexandra Killewald	Massachusetts, I	2021
The Rev. Yein Kim	Los Angeles, VIII	2021
Ms. Sophia Kitch-Peck	Bethlehem, III	2021
Ms. Katie Sherrod	The Episcopal Church in North Texas, VII	2021
The Most Rev. Michael Curry, *Ex Officio*	North Carolina, IV	
The Rev. Gay Clark Jennings, *Ex Officio*	Ohio, V	

Changes in Membership

The Rt. Rev. Susan Snook Brown resigned on Feb. 7, 2019 after her election to the episcopate and was replaced by The Rev. Spencer Hatcher on Feb. 12, 2019.

Representation at General Convention

Task Force members Spencer Hatcher and Laura Russell are authorized to receive non-substantive amendments to this report at General Convention.

Mandate

2018-C060 and 2018-D0232018-C060 Breaking the Episcopal Stained Glass Ceiling

Resolved, the House of Deputies concurring, That the 79th General Convention of the Episcopal Church authorize a task force with a membership of twelve members consisting of 3 bishops, 3 priests or deacons and 6 lay persons, including at least two young adults, appointed by the President of the House of Deputies and Presiding Bishop, of which women shall compose at least half of the membership, to research sexism in The Episcopal Church, and the role it plays in pay equity, status, and gender-based harassment. The task force shall report back to the 80th General Convention of the Episcopal Church with a plan to provide materials and resources to combat sexism in the Church.

2018-D023 Amend Canons III.6.5.g.4, III.8.5.h.4, and III.10.1.c.4 and Estabish Task Force

Resolved, That the 79th General Convention establish an Anti-Sexism Task Force to research and develop a training program for the purpose of addressing the systemic sexism within the church and the larger society with the goals of raising awareness of bias, eliminating sexist hiring practices within the church, and identifying intersectionalities of discrimination across multiple cultural identities; and, be it further

Resolved, That the Task Force be appointed consisting of 2 bishops, 2 priests, 2 deacons, and 6 lay persons, with the Presiding Bishop appointing the bishop members, and the President of the House of Deputies appointing the priests, deacons, and lay members. At least one half will be women with at least one woman appointed for each of the orders; and, be it further

Resolved, That the Task Force complete development of the training program by December 31, 2019; and be it further

Resolved, That the Task Force shall submit the training program to Executive Council for its approval by December 31, 2019; and be it further

Resolved, That the training, once developed and approved for use, be required for all bishops, priests and deacons, and all lay persons elected or appointed to leadership in The Episcopal Church including, but not limited to, Executive Council, diocesan Standing Committees, diocesan Councils, diocesan Boards of Trustee, and similar bodies by whatever name, diocesan search committees for the election of bishops and all congregational search committees; and be it further

Resolved, That this Task Force shall report to Executive Council yearly, and to the 80th General Convention on the status of the training implementation with recommendations for continued development and improvement.

Summary of Work

Meetings

Meetings of the entire Task Force were held in-person on March 19-21st, 2019 in Chicago, Illinois and via Zoom video conferencing on January 3rd 2019, May 16th 2019, June 18th 2019, November 4th, 2019, December 19th 2019, January 21st 2020, January 30th 2020, October 15th 2020, December 22, 2020 and January 13th 2021. Subcommittees of the Task Force also met at additional times to complete their work.

Why do this work?

"In the beginning when God created the heavens and the earth, the earth was a formless void and darkness covered the face of the deep, while a wind from God swept over the face of the waters… Then God said, let us make humankind in our image, according to our likeness… so God created humankind in [God's] image, in the image of God, [God] created them… God saw everything [God] had made, and indeed, it was very good[(1)]"

The work of the Taskforce to Study Sexism in The Episcopal Church and to develop an anti-sexism training is rooted in God's act of creation and in God's continued saving action in that creation, inviting us time and time again, though the process of repentance and reconciliation, towards wholeness and liberation; towards a creation truly made in God's own image. We remember this narrative of God's saving acts in the words of Eucharistic Prayer C: "Again and again, you called us to return. Through prophets and sages you revealed your righteous Law. And in the fullness of time you sent your only Son, born of a woman, to fulfill your Law, to open for us the way of freedom and peace.[(2)]"

In our Baptismal Covenant, with God's help, we promise to "persevere in resisting evil, and whenever [we] fall into sin, repent and return to the Lord.[(3)]" We covenant to "seek and serve Christ in all persons[(4)]" and to "strive for justice and peace among all people and respect the dignity of every human being.[(5)]" And yet, we also know that we have fallen short of these commitments made to God and to one another, both as individuals and as an institution. We have "denied [God's] goodness in ourselves, in each other, and in the world [God has] created."[(6)]

Systemic and intersectional sexism and gender-based discrimination is just one way in which we fall short. It is our hope that, incomplete as it may be, the offering of this Taskforce is one way the Episcopal Church might seek to "repent and return to the Lord" through an intentional process of learning, dialogue, truth-telling, and policy change at all levels of our institution. We believe that God continues to call us to return here and now and that our vocation as the people of God is to hear and respond to that call to the best of our abilities.

Work on 2018-C060 Breaking the Episcopal Stained Glass Ceiling

Identifying the Problem

Evidence of gender inequality and sexism in The Episcopal Church comes from multiple sources. The report “Called to Serve: A Study of Clergy Careers, Clergy Wellness, and Clergy Women” was prepared as a result of resolutions passed by General Convention in 2006. Though the data contained in the report need to be updated to reflect the church today, many of the issues flagged by the report remain, especially in regards to gender disparities in compensation, employment, and employment in the episcopate and other positions of relative prestige.[(7)]

“The 2019 Episcopal Clergy Compensation Report,” produced by the Church Pension Group, shows that the typical (median) male clergy member earns about $9,000 more annually than his female counterpart. Put differently, the typical female clergy member earns about 89 cents for every dollar her male counterpart earns.[(8)]

Domestically, Provinces VII and I show the most pronounced pay disparity with the typical male clergy member receiving more than $14,000 per year more than the typical female clergy member.[(9)] In these provinces, the typical female clergy member earns about 81 (Province VII) and 83 (Province I) cents for every dollar earned by the typical male clergy member. Province VIII is the most equitable domestically, but the typical male clergy member still receives nearly $5,000 per year more than the typical female clergy member. Congregations with the highest Average Sunday Attendance, the Program and Resource-sized Parishes, domestically, have the highest disparity in annual compensation, with the typical male clergy member receiving about $30,000 to $35,000 more than the typical female clergy member.

The pay disparities are not limited to Dioceses. At The Episcopal Church Center, currently, there is only one female Officer, and of the principle employees, only 30% are female. Combining Officers and Principal Employees, women hold only slightly more than 25% of these positions. The majority of these positions, some of the highest paid positions at The Episcopal Church Center, are occupied by men.

Gender differences in position type are one contributor to pay disparities: domestically, male clergy are about twice as likely to be employed as senior rectors (15% vs. 8% of female clergy), while female clergy are overrepresented as assistants (21% vs. 14% of male clergy). Narrowing the gender pay gap among clergy will require attention both to equitable pay for those in similar positions and equal access to high-paying positions. Some dioceses have attempted to address pay inequity, and this Task Force encourages ongoing conversation with those dioceses to observe how effective their efforts prove to be over time.

In addition to statistics regarding clergy compensation, stories from the #MeToo and #ChurchToo movements have shed light on how sexism manifests in our churches and our church structure, from harassment and abuse in church settings to disparities in the hiring process. Many men in the church expressed shock at the number of stories emerging from their colleagues and fellow parishioners, while many women saw their own stories affirmed by the experiences of others. The church as a whole is learning just how pervasive sexism is, and we are seeing how it affects people of all genders, not solely women. Slates of all-female Bishop nominations bring additional sexist attitudes, stating an all-female slate is not appropriate. We do not see these outcries with all male slates. In addition, the intersectional realities of those who identify as women provide further evidence of the many places and moments the church has failed to live into its promises to protect its flock, respect the dignity of every human being, and seek Christ in all persons.

Work in Progress

Many groups and individuals are working to address sexism and gender inequality in The Church.

People within the church are taking notice and demanding change. The House of Deputies Committee on Sexual Harassment and Exploitation and the Liturgy of Listening from the 79th General Convention are examples of this work happening on a legislative level. From the grassroots, groups like Women Embodying Executive Leadership (WEEL) and Leading Women have been birthed to support and encourage ordained women in discernment for senior level positions through the church.

Women have come forward to, through social media and other forums, to help break the stained glass ceiling. Groups on Facebook, and other platforms, help each other, not only by sharing stories, but also by giving guidance and encouragement to those who feel called to senior positions. These groups, created by women and for women, are helping to call out sexism and guide women to their callings.

Institutional Church actors are also working to reduce sexism and gender inequality in The Church. The Office of Transition Ministry is working with search committees and provides trainings aimed at addressing sexism within the search process. Some dioceses are doing internal audits looking at gender and representation. Bishop trainings regarding sexism are also underway. Efforts to collect and share data are also ongoing. The Church Pension Group has begun to enhance their data reporting on gender, dioceses are improving their ability to share information, and historical documents are more readily available.

Next Steps

The topic of sexism is so great that the work of Resolution 2018-C060 cannot be completed in a single triennium. Conversations that have only just begun must continue, and more information must be collected and made available to bring us closer to the justice we seek for all people, especially in the church.

One of the challenges to documenting and disrupting sexism and gender inequality in the church is a lack of coordinated resources and data. While many parishes, dioceses, church-wide entities, and groups are seeking to address these issues, discovering these efforts often requires being "in the know" and personal connections. This makes it challenging for interested individuals to know how to find information about pay disparities in their diocese or templates for equitable search processes or where they might find support. We strongly urge The Episcopal Church to create a single, centralized web dashboard with links to these resources.

Although the Church Pension Group provides excellent data on gender disparities in pay among clergy working in the United States, other pay information is much less readily available. Data on gender disparities in clergy salaries for those working outside the United States is not publicly available. Additionally, level of compensation is not readily available for the laity. As a start, we urge dioceses to collect information on lay staff compensation at both the parish and diocesan level and to inspect these data for gender inequalities. The Church has a responsibility to ensure pay equity of all its employees, not only the ordained.

We also urge additional analyses of the pay data that are already available. The Church Pension Group provides important information about gender pay disparities by characteristics including position and province, but the joint roles of these factors are typically not analyzed. Thus, at this time we are not able to assess the relative contributions to the gender pay gap of variation in experience, variation in placement conditional on experience, and variation in pay conditional on position. Understanding the underlying processes contributing to gender pay disparities will allow the Church to intervene more effectively to reduce them. We urge the church to fund a deeper analysis of the Church Pension Group data, either conducted by Church Pension Group employees or designed by an outside analyst (and, if necessary, implemented by Church Pension Group employees to avoid sharing the underlying, confidential data).

Understanding the full scope of gender inequality and sexism in the church also requires data other than compensation. There is very limited data regarding the status of women in positions of power. It would benefit the church to have full data on the gender of those in charge of Cardinal parishes and cathedrals. Likewise, the church has not collected data on the number of lay women who are wardens or serve on vestries, search committees, boards, standing committees, commissions on ministry, as Chancellors, or bishop's councils and diocesan boards. There is very little information covering hiring practices and search committee policies from parish-to-parish and diocese-to-diocese. Additionally, we could not find information reflecting the number of women who are finalists in job searches or who occupy leadership roles in seminaries.

In addition, there is limited information available regarding Title IV complaints of gender-based harassment. Dioceses have disparate systems for handling harassment complaints, there is no database of harassment policies for all dioceses, most knowledge around harassment complaints comes from hearsay and rumor (and is not always correct). Without this information it is very difficult to determine if the church as a whole encourages or allows a hostile environment. We do, however, applaud Resolution 2018-A120, which calls for the creation, administration, and maintenance of "a central database registry to track data pertinent to proceedings under this Title [IV]" and recognize the potential it holds for future study.

We recognize that gender inequality and sexism will take different forms in different places. Thus, addressing sexism will require not only action by this task force and The Episcopal Church, but by diocesan and congregational leaders. We ask that all bodies and groups of this church be required to examine their own composition, discuss the gaps, and create plans to narrow those gaps. Leadership should be having these conversations, should explain the problems, and work along with these bodies to correct what is broken in our church.

To continue its work, this task force needs more data and needs the partnership of The Church in collecting these data and making them centrally available. Talking about the issue of sexism in the church and gathering this data will help to normalize conversations around a subject that has been taboo for far too long. It should be the norm that these conversations inform the work we do in the church, from the creation of slates to discussions with clergy and lay leaders about toxic environments. With all due sensitivity, this data — along with the stories that accompany the data — must be collected, available, and shared. With these data and the stories told, the church will be better positioned to hold people accountable, to monitor and work to improve pay gaps, complaints, and the gender composition of leadership bodies.

Work on 2018-D023: Amend Canons III.6.5.g.4, III.8.5.h.4, and III.10.1.c.4 and Establish Task Force

This mandate revolved around creating an anti-sexism training, that would be presented to Executive Council for approval and promulgation. For the Task Force to better understand the mandate to create anti-sexism training, we began by reaching out to the wider church to discuss trainings in general to learn what has been effective, what would be used, and any lessons others could teach us from the past. We quickly realized several key points regarding church trainings in general:

- People are in different places, both literally and figuratively, and must be met there
- Begin with the basics
- Trainings need to fit into already existing schedules that are often quite full
- Multiple modes of delivery, such as in-person, as well as synchronous and asynchronous online options, are important
- Adaptable modules are most effective
- Accountability is key to performance and compliance
- Sexism varies from diocese to diocese and from setting to setting

Taking the example of meeting people where they are, we reflected on scheduling programs and trainings. If you do not begin with a shared understanding of terms, progress cannot be made. If you expect participants to spend 8 hours for an in-person training with a 2-hour one-way commute, participants are less likely to come and, if they do, are less likely to be engaged in transformative learning during the time they are present. Church groups should be able to take these trainings before a meeting or online in multiple, small segments. These trainings should be adaptable to each diocese. Local facilitation, rather than a nationwide group of trainers, allows for greater flexibility for those undergoing the training and is more cost-effective for all. Pedagogically, trainings should include multiple types of input and modes of instruction and learning.

Finally, we learned that trainings had to be easy to use. Church members (whether lay or clergy) are busy. Though they are eager to learn and change when needed, they also do not have the time to create and host trainings so something that could be used with very little preparation that maintained effectiveness is desired.

The Task Force, with all this information in mind, decided the best training we could create was a modular one which would allow flexibility for time and context and make it more likely that the trainings would be used. These training modules could be done before an already-scheduled meeting and could be led by coordinators with minimal preparation. Modules allow groups to choose their path through the training and to complete it in their own time. Our goal was to make it as accessible as possible to groups who we know are already heavily committed. Given that these church bodies have a shared purpose and often will have already built trust and relationships together, these trainings will leverage that community to allow a safer space for growth for participants.

We therefore created ten modules (in English only at this point) as a proof of concept. We believe these modules are the beginning of a complete anti-sexism training which would consist of assorted modules, each under one hour, that respond to specific competencies that the Task Force identified as necessary for this work. These competencies focus on participant objectives related to definitions and terminology, reflective practices, best practices, and the role of the participant in the transformative work of the Church. Specific learning outcomes are detailed in the modules. Eventually, the goal is to have different sets of modular training; for example, trainings for search committees; trainings about sexism and intersectionality; and trainings to understand how women of color experience sexism differently than white women; among others. Groups would be able to choose from different categories, so that they would be required to take a certain number of modules in each category to have completed the training satisfactorily.

The modules that we have proposed so far teach the basic concepts of sexism and gender bias, how scripture can be misused to continue sexist beliefs, and how our baptism teaches us to honor all people. The trainings each have a learning component as well as a conversation piece, and the host (or trainer) needs only to review the materials in advance. They can be used by any group, before or after a meeting, and at any time. The goal of these trainings was to create the beginning framework of an anti-sexism course. They can be rolled out as they are since they are the beginning of the framework. Other modules can be added in time, with specific groups in mind. Eventually, more advanced modules can also be added, so those who have taken the basic framework can then move to more advanced courses.

We feel they are a cumulative effort of our work to show General Convention a plan forward to teach gender bias, and to work together to eliminate sexism. We envision next steps including pilot programs in several dioceses and the creation of a structure for ongoing assessment of effectiveness of the trainings.

We have presented these to Executive Council and hope they will embrace our plan and continue by creating more modules that can expand on our work and enhance these already created trainings. Since our Task Force is due to sunset this triennium, we ask that a Task Force be appointed and charged with both creating more training modules and implementing the current modules, once approved by Executive Council, in the next triennium.

We heard from many groups within the church involved with formation and training that without a mechanism to track who has been trained, the trainings fall off the radar, and there is limited to no accountability. This mechanism for accountability should be linked to other required trainings for deputies and church leaders. There should be a group that is charged with confirming that all church leaders have taken the requisite number of modules to complete an appropriate level of training.

Our goal is to use all this gathered information and the future modeled behavior from leadership to deploy this task force's training modules, report back to the committee with feedback on the process, improve the training in time, and, ultimately, to build awareness that leads to true change at every level of The Episcopal Church.

Conclusion

There is a lot of work going on around the issue of sexism in The Episcopal Church and how to combat the gender inequities that continue to persist, but information is not all easily accessible. Disparate groups within the church are collecting data, but currently, there is no centralized, easily accessible bank of data. Even given all this work, there is still considerably more data to collect to fully understand sexism and the role it plays in The Episcopal Church. At this time, we are unable to compare the presence of sexism within the church to the secular world; we don't know if we are better, the same, or worse than the rest of society. However, we believe that if we're only on par with the rest of society, we're not doing what we're supposed to be doing as a church body. We should be leading on this, not mirroring or even trailing behind. Episcopalians can continue to work to stop sexism by calling it out, engaging in trainings, taking it out of the shadows, talking about it whenever and wherever it exists, and following best practices for leadership appointments, hiring, and compensation. The newly created training modules will help with this, but for a robust and more complete offering, continued work is necessary to develop additional modules, monitor their effectiveness, and develop additional interventions to reduce sexism within the church. We request that this Task Force continue its work in order to expand and continue the study of sexism, attempt to obtain and centralize more data, and to continue to develop the trainings and monitor their efficacy. We further recommend that these tasks be divided among multiple bodies in the next triennium: the work of creating educational materials and the work of collecting and analyzing data are both substantial and would benefit from focused attention by two distinct groups.

End Notes

(1) Genesis 1:1-2, 26a, 27 a, 31, NRSV

(2) Eucharistic Prayer C, Book of Common Prayer, 1982, pg. 370

(3) Holy Baptism, Book of Common Prayer, 1982, pg. 304

(4) Holy Baptism, Book of Common Prayer, 1982, pg. 305

(5) Holy Baptism, Book of Common Prayer, 1982, pg. 305

(6) Enriching Our Worship 1, 1998, pg. 56

(7) https://www.cpg.org/globalassets/documents/publications/called-to-serve-a-study-of-clergy-careers-clergy-wellness-and-clergy-women.pdf

(8) Church Pension Group. 2020. The 2019 Episcopal Clergy Compensation Report: A Geographic and Demographic Analysis of Clergy Compensation. https://www.cpg.org/globalassets/documents/publications/report-2019-church-compensation-report.pdf

(9) Church Pension Group. 2020. The 20219 Episcopal Clergy Compensation Report: An Interactive Tool https://www.cpg.org/global/research/clergy-compensation-report/#/start

Proposed resolutions

A061 Amend Canon I.4.6.j to include data regarding gender

*Resolved, th*e House of ____ concurring, that the 80th General Convention amend Canon I.4.6.j by the addition of a second sentence, as follows:

Canon 1.4.6.j

j. Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council. *Such Diocesan report shall include demographic information, such as gender, age and race, for the following positions: Standing Committee, Bishop Search Committee (if any), Chancellor and Vice-Chancellors, Trustees, all Wardens and Vestries.*

EXPLANATION

The Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training, during its work, continually found a lack of consolidated information regarding the demographics, especially gender, on diocesan positions. One of the challenges to disrupting sexism and gender inequality in the church is a lack of coordinated data. Though Church Pension Group has begun to collect data on clergy compensation and roles, there is no collection of data on either lay participation in senior positions, nor on demographics of key positions in a diocese or parish. To disturb the status quo, and work towards gender equality, we must see what currently exists. By requiring dioceses to report this information, we can create a consolidated source of information by which we can study the disparities and make meaningful recommendations.

A062 Requiring Dioceses to Create a Plan to Narrow Gender Gaps

Resolved, the House of ____ concurring, that the 80th General Convention require each Diocese to submit to the 81st General Convention a plan to narrow the gender equity gaps which exist in their Diocese; and be it further

Resolved, that this plan shall be created after careful examination into the composition of diocesan bodies, gender pay equity of both clergy and lay, and the demographics of parish leadership, including any search committees.

EXPLANATION

The Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training realized during their work that each Diocese must commit to combat gender inequality. We commend the few dioceses who have done work to understand the gender disparities in their own dioceses. We recommend that each Diocese be required to examine the composition of their bodies of leadership, understand the dynamics of gender at play with each, and to create a plan to narrow any gender equity gaps. Each diocese is different, and therefore they must create their own plan. No one body can undertake to do this for every diocese, so this must come from the diocese. The plan, which should be reflective of where the diocese currently stands on gender equality, should be created by the diocese and then submitted to the next General Convention.

A063 Creation of a Director of Women's Ministries

Resolved, the House of ____ concurring, that the 80th General Convention direct the Domestic and Foreign Missionary Society to establish a staff position of Director of Women's Ministries; and be it further

Resolved, that this staff person be empowered to create networks to train and mobilize women leaders, both lay and ordained; and to collect any data relevant to gender equality within The Episcopal Church.

EXPLANATION

When the position commonly referred to as the "Women's Desk" was eliminated, The Episcopal Church lost a place for women to go to when seeking assistance with gender equality issues. There was no longer a repository of data regarding gender equality, a human "dashboard" of programs for gender equality, or a place to ask a question regarding women in the church. Though other positions are still in existence; a position dedicated to women's issues has never been recreated. Throughout this triennium, the Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training continually found the need for a more consolidated effort on data around women's issues. From the lack of gender data on lay leadership, to templates to equitable search processes, to how to find support for gender equality, there is no central location or person coordinating these areas. We are asking dioceses to create plans for gender equality, but there is no staff to assist them. If we want to disrupt sexism, we must create a coordinated response along with accurate data. The Episcopal Church is committed to gender equality, and therefore should fund a staff person, not only to show their commitment, but to help empower women within the church.

Continuance recommendation

The Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training recommends a continuing opportunity to collect and study data to more fully understand sexism within The Episcopal Church over the coming triennium. To that end, the task force will need to be repopulated with current and/or new members to meet, collect and analyze data, roll out trial training sessions to be implemented by another body, and respond to feedback to further develop training modules.