



# THE EPISCOPAL CHURCH

THE DOMESTIC AND FOREIGN MISSIONARY SOCIETY  
OF THE PROTESTANT EPISCOPAL CHURCH IN THE UNITED STATES OF AMERICA

FOUNDED 1821 • INCORPORATED 1846

Adopted on: Apr 16, 2021

## **FIN 128 Assessment Review Committee Recommended Waivers**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, that the Executive Council of the Episcopal Church, meeting via Zoom, on April 16, 2021, grants assessment waivers to:

Diocese of Colombia for 2021 at \$3000.

Convocation of Churches in Europe for 2021 at 15% of 65% of income.

Diocese of Honduras at \$0 for 2020 and \$0 for 2021, with the encouragement that Honduras pay what it can for assessment and continue to work with staff and Executive Council on strategic plans for buildings, schools, and ministry, using the report of the EC special committee on Honduras.

**The Rev. Canon Michael Barlowe**

Secretary of Executive Council and

The Domestic and Foreign Missionary Society

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## **FIN 129 Trust Fund # 1268, The Hilbish Trust – Restricted Principal Fund**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, that Trust Fund # 1268, The Hilbish Trust - Restricted Principal Fund be established as an investment account for All Saints Episcopal Church in Concord, NC, which may withdraw principal and/or income upon request and may add to the principal at its discretion.

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**FIN 130 Trust Fund # 1269, Episcopal Diocese of Lexington Special Savings Account**

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The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

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Resolved, that Trust Fund # 1269, Episcopal Diocese of Lexington Special Savings Account, be established as an investment account for the Diocese of Lexington in Kentucky, which may withdraw principal and/or income upon request, and may add to the principal at its discretion.

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**FIN 131 Trust Fund # 1270 through Trust Fund # 1274 – f/b/o of St. James Episcopal Church, Taos, NM**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, that Trust Fund # 1270 through # 1274 - all prefixed RG, be established as investment accounts for St. James Episcopal Church, Taos, NM, which may withdraw principal and/or income upon request and may add to the principal funds at its discretion.

TF No. Name Amount 1270RG - SJC Taos Music Fund 63,868.19 1271RG – SJC Taos Columbarium 30,670.32 1272RG – SJC Taos Endowment 2,018,120.22 1273RG - SJC Taos Food Pantry 1,235,986.11 1274RG – SJC Taos General Fund 12481.28

3,361,126.12

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**FIN 132 Trust Fund # 1275, Mallery Bequest Fund**

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The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

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Resolved, that Trust Fund # 1275, Mallery Bequest Fund be established as an investment account for The Episcopal Church of St. Anne in Stockton, CA, which may withdraw principal and/or income upon request and may add to the principal at its discretion.

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## **FIN 133 Trust Fund # 1276 through Trust Fund # 1285 – f/b/o of St. Stephen’s Church Ridgefield, CT**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, that Trust Fund # 1276 through # 1285 be established as investment accounts for St. Stephen’s Church, Ridgefield, CT, which may withdraw principal and/or income upon request and may add to the principal funds at its discretion.

TF No.	Name	Amount
1276	Jean Lewis Beebe & David C. Beebe Jr. Fund	\$556,186.00
1277	Ursula Mary Brewster Fund	\$196,003.00
1278	Carol T. Decker Fund	\$817,168.00
1279	Evergreen Legacy Fund	\$122,933.00
1280	Fayerweather Fund	\$76,426.00
1281	Hitchcock Fund	\$7,380,202.00
1282	Kelley Fund	\$40,779.00
1283	Ministry Fund	\$348,307.00
1284	Music Fund	\$64,195.00
1285	Unrestricted Endowment Fund	\$5,415,345.00
		\$15,017,544.00

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**FIN 134 Trust Fund # 1286, Linda Chisholm Fund**

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The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

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Resolved, that Trust Fund # 1286, Linda Chisholm Fund be established as an investment account for Colleges and Universities of the Anglican Communion in New York, NY, which may withdraw principal and/or income upon request and may add to the principal at its discretion.

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**FIN 135 Trust Fund # 1287, Beam Family Operating Fund**

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The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

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Resolved, that Trust Fund # 1287, Beam Family Operating Fund be established as an investment account for Trinity Episcopal Church in Staunton, VA, which may withdraw principal and/or income upon request and may add to the principal at its discretion.

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### **FIN 136 Trust Fund # 1288 – Friends of Christ the King, Frankfurt, Germany**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

*Resolved*, that Trust Fund #1288, Friends of Christ the King, Frankfurt, Germany be established as an endowment account for Christ the King, Frankfurt, Germany, income to be distributed; and be it further

*Resolved*, that additions of principal may be made from time to time; and be it further

*Resolved*, that, should Christ the King cease to be a parish of The Episcopal Church, income shall be used in some other missionary field, preferably Germany, as the Canon to the Presiding Bishop for Ministry Within The Episcopal Church and the Treasurer shall designate, with approval by the Presiding Bishop.

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**FIN 137 Trust Fund # 1289, Christ Church Former CD Acct.**

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The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

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*Resolved*, that Trust Fund # 1289, Christ Church Former CD Acct. be established as an investment account for Christ Episcopal Church – Lexington of Lexington, MO, which may withdraw principal and/or income upon request and may add to the principal at its discretion.

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## **FIN 138 Trust Fund # 1290, St. John The Divine, Costa Mesa, CA Investment Fund**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

*Resolved*, that Trust Fund # 1290, St. John The Divine, Costa Mesa, CA Investment Fund be established as an investment account for St. John The Divine Episcopal Church of Costa Mesa, CA, which may withdraw principal and/or income upon request and may add to the principal at its discretion.

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Adopted on: Apr 16, 2021

## **FIN 139 Reflection on Paycheck Protection Program and Invitation to Discernment**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, that the Executive Council of the Episcopal Church, meeting via Zoom on April 16, 2021, commends to the church the attached Reflection on PPP and Invitation to Discernment, which demonstrates the complexities of the issues surrounding the reporting of the forgiven Paycheck Protection Program loans as income and records the progress of the Executive Council's thoughts and struggles as it heard objections and suggestions from around the Church. And be it further,

Resolved, that the Executive Council encourages all dioceses to undertake the discernment process suggested in this reflection in order to pause and ponder anew what God may be calling forth from the Church in this time, and, if the Diocese is so moved, to share their insights with the Executive Council.

**The Rev. Canon Michael Barlowe**

Secretary of Executive Council and

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America

To: Diocesan Relief Working Group

From: Sally Johnson, Chancellor to the President of the House of Deputies  
Mary Kostel, Chancellor to the Presiding Bishop  
Kent Anker, Chief Legal Officer

Date: February 17, 2021 as Revised March 12, 2021

RE: Preparation for February 19 Meeting (Including expanded PPP analysis)

The first question is whether or not PPP loans from the federal government that have been forgiven must be included as assessable income and thus should be reported as income on the Diocesan Report to the Executive Council and whether or not, if reportable as income, the amount reported should be deducted from income.

The second is whether the Executive Council could provide financial relief to dioceses that is tied in some way to a diocese' Assessment.

**Is PPP assessable and therefore reportable as “income” on the Diocesan Report of Operating Income**

The revenue to support the budget of the Church as adopted by the General Convention is generated primarily by an assessment paid by each diocese on its income, or more precisely, on that portion of a diocese's income defined by the General Convention as being subject to assessment in accordance with a formula adopted by the General Convention. See Canon I.1.8

Assessable “income” is defined in the Resolution the General Convention adopts at each General Convention and is further set forth in the Diocesan Report of Operating Income approved by the Executive Council in Part II: Operating Income and Audited Financial Statement. Section V of that Report requires reporting of “grant” income and while it also provides for deducting the amount of grants received from the DFMS for operations assistance, it makes no provision for deducting any other kinds of grants whether for operations assistance or otherwise.

Based on the General Convention Resolution, the Diocesan Report which has remained essentially unchanged since at least 2010 (with a minor change in 2017), and the course of practice in how the Diocesan Report has been understood by the Treasurer's Office and by dioceses, forgiven PPP loans must be included as income and may not be deducted and are, therefore, part of assessable income of dioceses.

Questions have been raised about whether the Church's diocesan assessment is in conflict with federal rules regarding PPP loan forgiveness.

As this Group is aware, Episcopal recipients of PPP funds must deal with multiple rules about the funds including federal rules concerning PPP eligibility, forgiveness, and tax treatment, and, in addition, the rules of the General Convention regarding assessments.

The first are the federal rules about what criteria organizations had to meet to receive PPP funds, criteria the federal government used to determine if a PPP loan could be forgiven, and what treatment forgiven PPP loan funds are given by the IRS for federal tax purposes. For forgiveness purposes, the SBA will review payroll records and receipts to make sure headcount was preserved and eligible expenses incurred.

The second and completely separate set of rules is how the General Convention defines which diocesan funds are included in the final amount to which the General Convention assessment formula applies. The Church is free to make its own rules about that and General Convention has done so. Under those rules, forgiven PPP loans are a type of income that must be reported on the annual Diocesan Report and are included in the total income report of the year in which the forgiveness takes place. Just as The Episcopal Church cannot tell the federal government how to operate the PPP program, the federal government cannot tell The Episcopal Church how to define what diocesan funds will be included in the calculation of a Diocese's assessment. The Church is not requiring that 15% (the current assessment rate) of the forgiven PPP loans themselves be used to pay a portion of a Diocese's assessment, only that the amount of the forgiven loan be reported as income. The source of all funds used to pay a Diocese's assessment is up to a Diocese.

### **Can the Executive Council provide financial relief to dioceses that is tied in some way to a diocese's Assessment?**

The Executive Council can change the Budget adopted by the General Convention but not the Assessment adopted by the General Convention, except for providing waivers pursuant to Canon I.4.6(g). See Canon I.1.11 and Canon I.4.6(h) and (i). Prior to the adoption of Canon I.4.6(g), in 2015, it is believed that Council did not make any adjustments to a diocese's Assessment<sup>1</sup> although, unpaid assessments were written off when Management determined, in its best judgment, they were uncollectable.

Therefore, any relief to dioceses provided by the Executive Council cannot involve a forgiveness, credit against, reduction in, or any other action that would, in fact or effect, change the Assessment of any diocese. The Council could provide grants, gifts, or other forms of relief. And it will continue to offer Waivers for financial hardship through its established process.

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<sup>1</sup> Prior to 2018 what is now the "Assessment" was called an "Asking."

<b>RESOLUTION</b>
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For: Executive Council  
From: The Joint Standing Committee on Finance  
Date: April 16, 2021  
Subject: Reflection on Paycheck Protection Program and Invitation to Discernment

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Resolved, that the Executive Council of the Episcopal Church, meeting via Zoom on April 16, 2021, commends to the church the attached *Reflection on PPP and Invitation to Discernment*, which demonstrates the complexities of the issues surrounding the reporting of the Paycheck Protection Program as income and records the progress of the Executive Council's thoughts and struggles as it heard objections and suggestions from around the Church. And be it further,

Resolved, that the Executive Council encourages all dioceses to undertake the discernment process suggested in this reflection in order to pause and ponder anew what God may be calling forth from the Church in this time, and, if the Diocese is so moved, to share their insights with the Executive Council.

## **Reflection on PPP and Invitation to Discernment... on Diocesan Relief and Structural Inequities Highlighted by Discussions on the Paycheck Protection Plan (PPP) from Executive Council 4-16-2021**

For more than nine months Executive Council's Joint Standing Committee on Finance (FIN), and Executive Council itself, wrestled with the question, **should forgiven PPP loans be assessed**. It was only late in these conversations that the focus shifted to, **should, or must, forgiven PPP loans be reported as income** on the Diocesan Report and therefore be part of the diocesan funds subject to assessment.

It became clear to the Diocesan Relief Working Group and to the Joint Standing Committee on Finance and Executive Council that the governing documents and practices of The Episcopal Church and the Domestic and Foreign Missionary Society hold sway over any discussion of whether forgiven PPP loans must be reported as income and therefore are subject to assessment. The Chancellors and Chief Legal Officer's Memo to the Diocesan Relief Working Group lays out clearly why this is true. [\(LINK\)](#)

Executive Council offers this reflection to emphasize that there remain many more areas for conversation and reconciliation generated by the PPP discussions.

The first instinct of some was to say, forgiven PPP should not be assessed. Why add to diocesan financial burdens? The ensuing discussions highlighted systemic inequalities and injustices prevalent in our church. The treasurer illustrated that not to assess the forgiven PPP loans privileges recipients of PPP and penalizes those dioceses that don't receive PPP. When a forgiven PPP loan is not treated as income and not assessed, those entities that received it not only get the extra money, but would in addition get an assessment break, while those entities that did not receive PPP did not get help with extra funds, are not getting an assessment break, and so are left with even fewer resources.

Not all dioceses chose to apply for PPP; furthermore, not all dioceses were eligible to apply, especially dioceses outside the United States; and there may be some dioceses that tried to apply but their financial institutions were not helpful in getting the applications through. In short, PPP is a USA program and thus not equally accessible by all of The Episcopal Church. Even in the USA, PPP was not distributed equitably or justly. Dioceses, institutions, and congregations that did not receive PPP did not get any income replacement or relief. PPP appears to be a windfall for some, while covering budget shortfalls for others. PPP is income replacement for some, not relief for all.

Requests for diocesan relief and objections to assessing the forgiven PPP as income came to the Presiding Bishop, Executive Council members, and FIN members. At the same time, few assessment waiver requests came in. There was a growing desire among FIN members, Executive Council officers, and the Executive Leadership Team to acknowledge and remediate the financial strain on dioceses. However, it is difficult to determine true need and formulate a just response when many dioceses made no request for relief and issues of privilege are also at work. How does Council say, "We are in this together; we understand that it's hard right now and most of us are struggling in one way or another. How can we best plan strategically for our future together?"

In response to these requests and questions, in January 2021, Executive Council approved FIN 127([LINK](#)), which mandated immediate diocesan relief, and a working group was formed.



The Diocesan Relief Working Group decided at its first meeting on February 19, 2021, that it needed to consider separately the questions of, first, the inclusion of forgiven PPP as income on the Diocesan Report, and therefore part of assessable diocesan funds, and, second, how to provide relief. See the Chancellors and Chief Legal Officer's Memo [\(LINK\)](#) for more detail on reporting forgiven PPP loans as income and its assessment.

The Working Group heard both from dioceses that were not experiencing financial strain and from dioceses that were dealing with shortfalls and tightening budgets, and yet not asking for relief. Their point was that the need for relief was not universal. Nonetheless, the Working Group was charged with developing a plan for relief.

So, FIN 140 [\(LINK\)](#) outlines a plan that offers the opportunity for diocesan leadership to discern diocesan need, to request funds to help fulfill those needs, and to share the funds with others in need.

The Working Group also wondered what, besides financial relief, dioceses really want and need. Is the focus on finances a symptom of an underlying longing or deficit? What would be most helpful to the varied dioceses? How could Council ascertain how to be most helpful?

And, at the same time, the Working Group wondered whether there is a way to help Diocesan leadership, and others, understand the systemic privilege that is at work here, and invite them to a change of mind and heart.

The pandemic and resulting hardships have laid bare underlying systems of inequity that have permeated the economic and social institution of the U.S. from its inception. The final decision on reporting forgiven PPP as income, and therefore subject to assessment, was an issue of governance and practice as required by General Convention. Executive Council's examination of the PPP as well as its designing of additional avenues of relief tailored to the unique needs of our Province of the Anglican Communion have given members more insight into the capacities and limitations of our Church's structures. Executive Council will continue to wrestle with these issues and the dismantling of institutionalized systems of racism and other forms of abuse of power. Executive Council hopes the Church will appreciate the depth of thought and discussion resulting from our efforts.

Council commends to the dioceses applying for relief, the optional discernment process included in the relief grant request form and included below. These questions and priorities have guided Executive Council's actions in redirecting funding to the most vulnerable communities and the most promising remedies.

A plan for use of these funds is not required in order to receive the relief grant or as a way of expediting the distribution of funds. Rather, diocesan leadership is invited through prayer and discernment to determine how God is calling that diocese to be the church it needs to be today.

And please note: All dioceses may request a relief grant, regardless of whether they are current with their assessments or have, or have not, received an assessment waiver.

## Diocesan Relief Discernment (optional)

The Council invites diocesan leadership to reflect on what needs might be met by receiving a relief grant. For example (*words in italics are from the Plan for Budget Management*) [LINK:](#)

*To be the church we are called to be in this time:*

- cover diocesan budget shortfall
- provide support for diocesan congregations or institutions
- provide support for diocesan programs or governance
- Other, please describe

*To strive for justice and peace, to respect dignity, and to fight racial injustice:*

- encourage outreach and justice work
- explore and combat systems of oppression
- promote beloved community among those who are estranged
- Other, please describe

*To support the most vulnerable, the marginalized, and the under-served and under-resourced within our church and beyond:*

- request the funds and share them with ministries, congregations, and dioceses in need or that support the most vulnerable among us
- request the funds and share them with congregations, organizations, or institutions that are working on combating racism and white supremacy
- not request a grant - EC will allocate undistributed funds for diocesan relief after all requests are met, as soon as feasible, after November 30, 2022.
- Other, please describe

How else can Executive Council offer relief to your dioceses? Is there anything you would like Executive Council to know?



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Adopted on: Apr 16, 2021

## **FIN 140 To Provide Financial Relief to Dioceses**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, as stated in FIN-127 (January 2021), Executive Council sees the financial strain of the pandemic on dioceses and acknowledges the need to provide immediate relief. Council recognizes the dioceses' struggles to balance budgets, make hard decisions about staffing and program, and best support the stressed congregations under their care.

Executive Council, made up of members from across the church-wide body each with their own pandemic struggles and stories, asserts that we are one church. Across the church, life and finances are hard and faithful work is exhausting. The future, financial and otherwise, is uncertain and uncharted. We witness the determined and costly efforts across our church to continue in the Way of Love. And, be it further

Resolved, that Executive Council reaffirms the principles of budget planning set forth in *A Plan for Emergency Management of the Current General Convention Budget* (2019-2021) in June 2020, including its underlying theology and commitment:

We (Executive Council) hope and pray that the strategies employed will reflect our collective commitment to the way of love as embodied by Jesus of Nazareth. We pledge to respect the dignity of every person and strive for justice and peace among all people as we are called to do by the promises we renew in the Baptismal Covenant . . . Remembering that we are the people of God, we are open to and heartened by the presence of the Holy Spirit who is calling us out of the wilderness to become the church we are called to be during this time.

*The Plan continues...*

The Executive Council renews its commitment to use its human and financial resources to support the most vulnerable, the marginalized, and the under-served and under resourced within our church and beyond. At no time in our recent history have the results of racist injustice been so apparent, and we pledge to keep this truth in our sight as we make decisions about the budget. Therefore, be it

Resolved, that the Executive Council of the Episcopal Church, meeting via Zoom on April 16, 2021, in response to FIN-127 and in keeping with the principles of *A Plan for Emergency Management of the Current General Convention Budget* (2019-2021), allocates up to \$40,000 per diocese to provide relief from Covid-19 related financial hardship to each diocese, and be it further

Resolved, that, in accordance with Canon I.4.6(g), Executive Council issues approval for dioceses otherwise not in compliance with Canon I.4.6(g) to request and receive this relief grant, and be it further

Resolved, that the process by which diocesan leadership discerns a need for relief, and the form for the ecclesiastical authority to make a request for a grant, and the method to request payment is spelled out in the [accompanying request form](#). And be it further

Resolved, that the Executive Council directs the treasurer to wire the requested relief, up to \$40,000 per diocese, to the dioceses as soon as feasible. And be it further

Resolved, that the availability of these relief grants will be communicated to the church by press release and by letters to the ecclesiastical authorities and treasurers of every diocese, immediately following approval of this resolution.

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**The Rev. Canon Michael Barlowe**

Secretary of Executive Council and

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America

**To: Executive Council**

**From: Executive Council's Joint Standing Committee on Finance**

**In response to FIN-127, January 2021**

**April 16, 2021**

**RECOMMENDATION FOR DIOCESAN RELIEF GRANT PROCESS:**

In June of 2020, when faced with the potential economic dislocation caused by the Covid-19 pandemic and in response to the unfolding awareness of the effects of white supremacy and racism, the Executive Council developed and approved *A Plan for Emergency Management of the Current General Convention Budget (2019-2021)*.

While the *Plan* focuses specifically on how to make cost reductions in the General Convention Budget should income decrease, the Executive Council believes that the principles set forth in the *Plan* provide a good framework for considering how to provide financial relief to dioceses as directed by Council's January 2021 resolution FIN-127.

The *Plan* includes a statement of the underlying theology and commitment:

We (Executive Council) hope and pray that the strategies employed will reflect our collective commitment to the way of love as embodied by Jesus of Nazareth. We pledge to respect the dignity of every person and strive for justice and peace among all people as we are called to do by the promises we renew in the Baptismal Covenant.... Remembering that we are the people of God, we are open to and heartened by the presence of the Holy Spirit who is calling us out of the wilderness to become the church we are called to be during this time.

The *Plan* continues...

The Executive Council renews its commitment to use its human and financial resources to support the most vulnerable, the marginalized, and the under-served and under resourced within our church and beyond. At no time in our recent history have the results of racist injustice been so apparent, and we pledge to keep this truth in our sight as we make decisions about the budget.

With the *Plan for Emergency Management* as a guide, the Executive Council has allocated funds for relief grants of up to \$40,000 to any diocese that discerns a need and makes a request over the next 18 months between May 1, 2021 and November 30, 2022.

1. The Council invites diocesan leadership to discern what needs might be met by receiving a relief grant. For example, (*words in italics are from the Plan for Budget Management*) how might our diocese use this relief grant:

- *To be the church we are called to be in this time:*
  - cover diocesan budget shortfall
  - provide support for diocesan congregations or institutions
  - provide support for diocesan programs or governance
- *To strive for justice and peace, to respect dignity, and to fight racial injustice:*
  - encourage outreach and justice work
  - explore and combat systems of oppression
  - promote beloved community among those who are estranged
- *To support the most vulnerable, the marginalized, and the under-served and under- resourced within our church and beyond:*
  - request the funds and share them with ministries, congregations, and dioceses in need or that support the most vulnerable among us
  - request the funds and share them with congregations, organizations, or institutions that are working on combating racism and white supremacy
  - not request a grant - EC will allocate undistributed funds for diocesan relief after all requests are met, as soon as feasible, after November 30, 2022.

## 2. How to request a Relief Grant

- a. The diocesan Ecclesiastical Authority should fill out the grant relief request form [\[link here\]](#) between May 1, 2021 and November 30, 2022. It will be sent to the Treasurer & chair of FIN,
- a. The request form asks the ecclesiastical authority to state the amount of Relief Grant requested, up to \$40,000. And to
- b. Provide the name of the diocesan contact person - phone and email

## 3. How the funds are sent -

- a. Funds will be wired to the diocesan account upon receipt of the form to authorize transfer that is included in the grant request form.
- b. Optional, included on the request form: Is there any non-financial relief that would be helpful to your diocese? Anything you want the Executive Council to know?

4. All requests will be responded to by the Office of Development or the Treasurer's Office, with something like... The Executive Council hopes that you will share your good news with the larger church as to how this grant has assisted in your mission and ministries and in responding to needs within the diocese or beyond. While reporting is not required, the hope is that the sharing of stories in the spirit of abundance will be a witness to the Church. A few sentences or paragraphs will suffice. Please send stories along to the Office of Development any time before December 31, 2022. Development could send occasional reminders, too.



# THE EPISCOPAL CHURCH

THE DOMESTIC AND FOREIGN MISSIONARY SOCIETY  
OF THE PROTESTANT EPISCOPAL CHURCH IN THE UNITED STATES OF AMERICA

FOUNDED 1821 • INCORPORATED 1846

Adopted on: Apr 16, 2021

## **MB 025 Hate Crimes Against Asian and Pacific Islanders**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, That the Executive Council, meeting virtually on April 16, 2021, mourns the lives lost in senseless acts of violence against those of Asian descent and Pacific Islanders and stands in support of the victims of such violence and their families. We are both grieved and outraged that members of our Asian community wake every morning fearing acts of violence and have been the scapegoats for this pandemic; and be it further

Resolved, That The Episcopal Church affirms the March 23rd Statement from the Deputies of Color Steering Committee (in Explanation) about the murders in Atlanta, Georgia, on Tuesday, March 16, 2021, and the rise in hate crimes (see [General Convention Resolution: 2000-C029](#)) against people of Asian descent, Asian Americans and Pacific Islanders; and be it further

Resolved, That the Executive Council commends the United Nations Secretary-General for highlighting the global rise in violence against people of Asian descent, including deadly attacks, harassment, bullying, discrimination, misogyny, and incitement to hatred in media and social media platforms in the United States and globally; and be it further

Resolved, That we deplore this historical pattern of scapegoating (see [General Convention Resolution: 2018-A230](#)) and weaponizing words for political purposes, exacerbating systemic racism and fear against people of color, resulting in the rise in hate crimes targeting women and the elderly in the midst of a global pandemic; and be it further

Resolved, That in order for the Executive Council to call upon the churchwide community to speak out, teach and be the prophetic voice, it accepts the challenge to commit greater time for exploring further and more intentionally its members' engagement with systemic racism; and be it further

Resolved, That we urge the clergy and laity of The Episcopal Church to offer a prophetic response to these deaths and acts of injustice by committing to the ongoing, patient, determined, faithful, long-term ministry of anti-racism work; and be it further

Resolved, That The Episcopal Church build on the framework of Becoming Beloved Community, created in response to [General Convention Resolution 2015-C019](#) Establish Response to Systemic Racial Injustice, to enhance the capacity of the Church to work in communities to organize, advocate, and dismantle systems, policies and practices that reinforce racialized violence and vigilante acts and perpetuate the sin of racism; and be it further

Resolved, That we provide the necessary resources and tools for our dioceses, congregations, clergy, lay leaders, and Anglican Partnerships to work towards the Beloved Community.

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A handwritten signature in black ink that reads "Michael Barlowe". The signature is written in a cursive style with a long horizontal flourish at the end.

**The Rev. Canon Michael Barlowe**  
Secretary of Executive Council and  
The Domestic and Foreign Missionary Society  
of the Protestant Episcopal Church in the United States of America





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Adopted on: Apr 16, 2021

## **MW 037 2021 Roanridge Trust Grants**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, That the Executive Council, meeting April 16, 2021 via online meeting, approves the 2021 Roanridge Trust Grants (totaling \$180,851) from the Roanridge Trust grant funds. The distribution of the grants is subject to the full payment of the 2020 diocesan assessment or granted diocesan waiver.

Bishop Kemper School for Ministry, Satellite Campuses for Rural Students, Diocese of Kansas, \$16,221

Enrichment for Kinship Families, Youth (PK-12) and Struggling Families, Diocese of West Virginia, \$18,950

B.U.I.L.D. (Building a United Interfaith Lexington through Direct-action), St. Raphael Episcopal Church, Diocese of Lexington, \$20,000

Botetourt Music Academy, St. Mark's Episcopal Church, Diocese of SW Virginia, \$17,500

Diocese of Vermont Local Ministry Support Teams Training and Formation, Diocese of Vermont, \$5,530

Empowering Residents of Palmetto, Florida, St. Mary's Episcopal Church, Diocese of SW Florida, \$20,000

Initiative for Reimagining Ministry in North Dakota, Diocese of North Dakota, \$20,000

Partnership for ReNEWal, Diocese of Upper South Carolina, \$20,000

Ascension School Ministry Internship, Diocese of Eastern Oregon, \$24,650

Reframing the Mutual Ministry Review: Collaboration for Mission and Ministry, Diocese of North Carolina, \$12,000

St. Andrew's House, Diocese of Olympia, \$6,000

**The Rev. Canon Michael Barlowe**

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Adopted on: Apr 16, 2021

## **MW 038 UTO Grants 2021**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, That the Executive Council, meeting April 16, 2021 via online meeting, approve and authorize the following, as recommended by the United Thank Offering Board and reviewed and recommended by the Joint Standing Committee on Mission Within The Episcopal Church. The grants listed below total \$479,369.53.

Payment comes from available United Thank Offering grant funds. The distribution of the grants is subject to the full payment of the 2020 diocesan assessment or granted diocesan waiver.

### Diocese Project Title Funding Amount

Alabama Hispanic COVID-19 Vaccination Initiative 2,990.00

Amazonia/Brazil Educational Complementation - Education Art 24,811.81

Arizona St. Philip's in the Hills Kitchen on a Mission 5,050.00

Central Gulf Coast St. Mark's Food Pantry 3,232.68

Central Pennsylvania Transforming Collective Isolation into Communal Holiness 8,600.00

Ceylon/Columbo Building Resilience through Equal Access to Education 15,769.32

Chicago Sustaining Project WORK 4,720.00

Cuba A Light of Love 8,300.00

Cyprus and the Gulf/Middle East Ministering to Families and Individuals in Need from St. Paul's, Nicosia 23,569.00

Emery Trust Episcopal Service Corps 66,000.00

Episcopal Migration Ministries Neighbor to Neighbor 25,000.00

Honduras COVID-19 Relief Through Transportation to Care 25,000.00

Lexington Sustaining: Reading Camp 12,000.00

Los Angeles Healing From Loss 7,780.00

Maryland Resurrection Food Distribution 25,000.00

Massachusetts MANNA Hispanic/Latinx Pastoral Intern 14,049.00

Missionary District/Brazil Professionalization and Income Generation: Empowering Women in Social and Economic vulnerability in the context of COVID-19 8,207.00

Missouri Sustaining: Trinity Food Ministry in COVID-19 Times 11,300.00

Mumias/Kenya COVID-19 Children's Safehouse 25,000.00

New Jersey St. Paul's Community Health Clinic 11,065.18

North Carolina Julia Chester Emery Internship 28,500.00

North Central Philippines/Philippines EDNCP Vegetable Consolidation and Multi-Purpose Center Project 24,986.00

North Dakota Memorial Feeds - Feeding Recovery from COVID-19 17,000.00

Pennsylvania The Food Pantry at Grace 10,350.00

Presiding Bishop Support for Episcopal Chaplaincy 36,264.54

Tanzania Reaching Out: Children at Schools & Colleges 9,825.00

Western Tanganyika/Tanzania Assisting Mothers' union with Planting Plots to Develop Livelihoods to Respond to COVID-19 25,000.00

TOTAL: 479,369.53

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**The Rev. Canon Michael Barlowe**

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Adopted on: Apr 16, 2021

## MW 039 Conant Grants 2021

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

Resolved, that the Treasurer is directed to distribute up to \$124,608.00 from Trust Fund 649, the William Schubael Conant Fund, to the following 13 recipients for the academic year 2021-2022:

Name (First)	Name (Last)	Seminary	Project Title	Recommendation	Award Amount
Marty Wheeler	Burnett	Virginia Theological Seminary	Shapers of The Hymnal 1982	Tentative	\$6,600.00
Elizabeth	Friend	Virginia Theological Seminary	Exploring Metaphors for the Spiritual Life in Teresa of Avila	Yes	\$4,550.00
Sharon	Heaney	Virginia Theological Seminary	Engaging Latino/a Theologies Writing and Research Project	YES	\$11,025.00
Ruthanna	Hooke	Virginia Theological Seminary	Performative Approaches to Teaching Homiletics	YES	\$6,190.00
Lisa	Kimball	Virginia Theological Seminary	We will, with God's help	YES	\$7,493.00
Melody	Knowles	Virginia Theological Seminary	Book Writing - How to read a psalm	YES	\$8,479.00

Sheryl	Kujawa-Holbrook	Bloy House, The Episcopal Seminary at Los Angeles	History of the Sisterhood of the Holy Nativity	YES	\$5,053.00
Julie	Lytle	Bexley Seabury Seminary Federation	Pastoral Care Training for Alaskan Indigenous People: Curricular Development and Course Delivery	YES	\$14,200.00
Gena	Minnix	Seminary of the Southwest	Digital Media Design and Virtual Learning for Theological Formation	YES	\$12,710.00
Julie Faith	Parker	General Theological Seminary	The Joy of Text: Serving Theological Education through Strengthened Partnership, Creative Teaching, and Biblical Writing	Yes	\$13,346.00
Altagracia	Perez-Bullard	Virginia Theological Seminary	Afro-Latinidad in Episcopal Churches in the Caribbean: the impact of racial, cultural and colonial/post-colonial realities on leadership	Tentative	\$14,000.00
David	Stark	School of Theology, The University of the South	Monuments, Memory, and Preaching: Engaging Place with Eucharistic Hope	YES	\$12,612.00
Allison	St. Louis	Virginia Theological Seminary	Pastoral Care and Counseling: Strengthening Spiritual Stamina in a Post-Pandemic Church	YES	\$8,350.00
					\$124,608.00



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Adopted on: Apr 16, 2021

## **MW 040 Renewed Commitment to LGBTQ+ Equality**

The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

RESOLVED, that the Executive Council, meeting virtually on April 16, 2021, acknowledges that over the course of more than 40 years, the Episcopal Church has prayed, studied, and declared the blessing that LGBTQ people are and always have been in the Church ([1976-A071](#)), adding language to our canons and our liturgical texts to uphold the dignity of their humanity, presence and leadership, and be it further

RESOLVED that Executive Council grieves and confesses the Church's continued heterosexism, homophobia, biphobia and transphobia, and the ongoing harmful impact of anti-LGBTQ Christian proclamation, preaching, pastoral care, and theology upon those of us within and those beyond our ecclesial borders, in present as well as the past. We acknowledge that those who have been harmed must be the authorities on whether and how pain has been inflicted, and be it further

RESOLVED, that the Executive Council is committed to ensuring that the Episcopal Church truly and authentically reflect the "full and equal claim" that LGBTQ people have upon the "love, acceptance, and pastoral concern and care of the Church," ([1976-A069](#)) by focusing on, honoring, and recognizing LGBTQ voices, experiences and leadership, proclaiming that we support LGBTQ equality not in spite of our faith, but because of it.

**The Rev. Canon Michael Barlowe**

Secretary of Executive Council and

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Adopted on: Apr 16, 2021

**MW 041 Approve UTO Focus and Criteria**

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The following is a true copy of a Resolution adopted by the Executive Council at its meeting April 16, 2021, at which a quorum was present and voting.

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Resolved, That the Executive Council approves the UTO Focus and Criteria as defined in the attached document.

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**The Rev. Canon Michael Barlowe**

Secretary of Executive Council and

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America



UNITED THANK OFFERING

Dear members of Executive Council,

The members of The United Thank Offering Board send their greetings to you. We are submitting our new 2022 grant focus and criteria for approval. The Board has elected to make an addition to the pre-approved 2021 grant focus (which we delayed a year to address COVID-19) to provide clarity on the types of projects eligible for funding within this focus area. The focus now reads: ***Care of Creation: Turning love into action by caring for God's creation to protect the most vulnerable who will bear the largest burden of pollution and climate change through justice, advocacy, environmental reparations or the development of formational materials.*** These additions were decided after the Grants Committee met with The Rev. Melanie Mullen and Jerusalem Greer.

In addition to adjusting the focus, we are also suggesting a grant maximum of \$55,000. This decision was made based on the 2014-2020 average amount funded and in light of what we learned from the COVID-19 grants which also had maximum amounts named. We believe that offering people a maximum amount will help applicants create a more manageable budget for a project that needs to be completed within a year and will allow UTO to continue to fund as many projects as possible. Because some projects are inherently expensive, applicants will be permitted to submit a request for funds up to \$100,000. They will be asked to submit a clearly stated justification and show significant in-kind support.

The last major change that was made to the criteria is regarding companion relationships. The UTO Board has chosen to discontinue receiving companion applications. The companion application process was started in 2008 and sadly we do not have any record as to why that process was started. During the COVID-19 grants, we encouraged Americans interested in doing work in a diocese outside of the United States to support their partner in applying directly. Only one diocese did this, and that grant was awarded in the fall cycle. As we reflected on the companion process, and because Executive Council no longer approves companion relationships, we believe that continuing to ask overseas dioceses or the Anglican Communion to find someone to endorse and oversee their application to be a form of paternalism. With that said, we know that the need is great and having two chances at a grant is really needed. Therefore, dioceses of The Episcopal Church who receive funding from the General Convention budget as well as the Provinces of The Anglican Communion will be permitted to submit two applications. If a relationship is involved in the project, then we welcome a letter of support from the other bishop participating in the project. It is our hope that this change will empower those dioceses with a strategic plan to submit the best two projects within the focus that also help support the overall work of the diocese.

Finally, after a year without the Young Adult and Seminarian (YAS!) Grant program, we have also decided to discontinue this process due to lack of applications in previous years and the availability of grants for this group from other entities.

Thank you for your ongoing support of the work of the United Thank Offering, especially this year as we tried to adapt and change alongside the pandemic to provide as much help as possible.

Joyce Landers  
UTO Vice-President

United Thank Offering of The Episcopal Church  
815 Second Avenue, New York, NY 10017

[episcopalchurch.org/uto](http://episcopalchurch.org/uto)





# United Thank Offering 2022 Grant Focus and Criteria

*UTO was founded to support innovative mission and ministry  
that the Church budget has not yet expanded to fund.*



**The 2022 United Thank Offering Grant session will focus on the following:**

## Care of Creation:

Turning love into action by caring for God's creation to protect the most vulnerable  
–who will bear the largest burden of pollution and climate change through

- justice
- advocacy
- environmental reparations
- or the development of formational materials.

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## Funding Range:

The UTO Board will accept applications from \$1,000 to \$55,000. This range was determined using the average of the amounts awarded from 2014 to 2020. Please note: we ask you to request only what you need for your project. UTO is very appreciative of those applicants that exhibit financial restraint so that we can fund as many projects as possible. In circumstances of extreme need, applicants may request up to \$100,000; however, you must clearly justify why the project requires that level of support from UTO and show an adequate level of in-kind support.

## The United Thank Offering will accept:

- grant applications for NEW ministries' start-up costs or start-up costs for NEW projects/programs within an existing ministry program added for a purpose other than simply increasing the number of current program participants;
- grant applications for seed money for start-up positions, either full or part-time for a new ministry (see above);
- **one** grant application per diocese within The Episcopal Church;
- **one** additional application from any diocese of The Episcopal Church that receives funding from the General Convention Budget (*for a full list please see the Application Process Form*);
- **two applications** from each Province of the Anglican Communion; however, **they** must be from two different dioceses within the Province.
- **NOTE:** Only Episcopal institutions (parishes, dioceses, provinces, schools, seminaries, monastic communities, Episcopal organizations and other Episcopal affiliated entities) are eligible to receive these funds. Partnerships with non-Episcopal entities are welcome and encouraged, but an Episcopal entity must serve as the recipient of the funds, project leader, active manager, owner of any materials/equipment/land purchased, supervisor of staff paid with UTO funds, and reporting agent.

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## A United Thank Offering grant application must:

- spend grant money and return the final report of the funds within one year of receipt of the grant or apply three months prior to the deadline for an extension of up to an additional year;
- share final virtual formation resources with the whole church through UTO;
- show how computer equipment, if requested in the budget, will be protected, maintained, and supported going forward (please note: UTO cannot fund service contracts for computers);
- spell out construction costs in detail (see the sample construction budget for help);
- show financial or in-kind support.

## The United Thank Offering will NOT fund:

- capital campaigns or debt reductions;
- deferred maintenance (repairs or upgrades to the physical plant or facility must be tied to the specific ministry or project of the current application);
- debts obligated or incurred before the date of the grant award;
- employment benefits, fees, taxes, or social security costs;
- maintenance of a website or printing of marketing materials however, the initial development/creation/translation of materials, videos, or a website **can** be funded;
- project site/programs for two consecutive years (for example, you cannot apply for two different projects in the same building two years in a row);
- operational budgets (meaning the proposed budget and program is the same as the year before, which includes portions of salaries for individuals who are already paid fulltime salaries);
- honoraria or any payment of any kind to an individual without an invoice;
- purchase of consumable items (e.g., food, medicine, paper goods, toiletries, fuel of any kind, school supplies, anything that is given to those attending a program, travel, mileage, overnight accommodations, gift cards, etc.);
- fees of architects or engineers, permits or insurance of any kind, shipping costs, background checks, or fingerprinting;
- contingency funds or overhead costs including utilities;
- rent or leasing of any kind;
- scholarships, tuition, camp fees, or attendance incentives;
- previously funded requests;
- incomplete grant applications;
- grant applications from an Episcopal or Anglican diocese that has a current delinquent/outstanding UTO grant report;
- applications from dioceses that have not paid their full assessment or received a waiver from Executive Council, in accordance with Canon I.4.6 (f-g);
- grant applications that have 51% or more of the total requested from UTO out of criteria (*these items may appear on the budget, but it must be indicated who is funding them; see sample budget for more information*);
- emergency response requests.

## Additionally:

- for all garden or agricultural project applications:
  - UTO will fund: soil, manure, trees, bushes, irrigation systems
  - UTO will NOT fund: fertilizer, plants, flowers, seeds
- any garden or agricultural project within The Episcopal Church must be enrolled in the Good News Garden Program: <https://www.episcopalchurch.org/good-news-gardens/>
- UTO will only fund **one-half** of the actual purchase of a vehicle requested in the United States (except in dioceses which receive funding from the General Convention budget) and the budget must show where the other half of the funding will come from.
- UTO requires a proposed bill of sale with a breakdown of costs-which must accompany **all** applications requesting computer equipment (and justification for the choice given the cost), a vehicle (meaning anything with wheels that can be driven), land or the purchase of an existing building (both in the United States and in other countries).
- UTO will fund a vehicle for one year only—there will be **NO** extensions allowed, regardless of location.

**Please join the United Thank Offering Board for one of the webinars listed on the helpful hints page or email [hmelton@episcopalchurch.org](mailto:hmelton@episcopalchurch.org) with questions!**