



Adopted on: October 21, 2025

EC 001 Appointment of Nominating Advisory Committee

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Executive Council, meeting in Hendersonville, NC on October 20 and 21, 2025, and pursuant to Canon I.4.1(e), hereby appoints the following member to the Nominating Advisory Committee:

Crystal Plummer

The Rev. Molly James

Interim Executive Officer

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America



Adopted on: October 21, 2025

EC 002 Election of Joint Investment Committee

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Executive Council, meeting in Hendersonville, NC on October 20 and 21, 2025, and pursuant to Article 8, Section 5(b) of the by-laws, hereby elects the following members of the Joint Investment Committee, for a three-year term, following their joint nomination by the Chair and Vice Chair:

Rev. M.E. Eccles
Charlie Garland,
Kirsten McElroy (Second Term)
Andrea McKellar
Crystal Plummer (Second Term)
Dianne Audrick Smith

The Rev. Molly James

Interim Executive Officer

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Adopted on: October 21, 2025

EC 003 Election of Representatives to Ecumenical Bodies

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Executive Council, meeting in Hendersonville, NC on October 20 and 21, 2025, and pursuant to Canon I.4(2)(k), hereby elects the following representatives to Ecumenical Bodies:

Evangelical Lutheran Church of America Coordinating Committee
Bishop Doug Sparks
Stewart Lucas
Erik Karas
Jane Johnson
Carole Maddux

The Rev. Molly James

Interim Executive Officer

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Adopted on: October 20, 2025

FIN 018 Diocesan Assessment Relief

The following is a true copy of a Resolution adopted by the Executive Council.

Whereas, The Enabling Resolution (A164), adopted by the 81st General Convention, for the Budget for The Episcopal Church provides:

That the assessment formula (Canon I.4.6.b.) for the period January 1, 2025 through December 31, 2027 is adopted based on a single assessment on each diocese. In each year the diocesan total adjusted operating income, as reported in the annual diocesan financial report (Canon I.4.6.j. and Canon I.6.4) for the year two years prior to the year to which the assessment is applied [e.g., 2025 assessments are to be based on 2023 actual income figures], shall be reduced by a \$200,000 exemption. A single assessment shall be applied to the remaining amount (balance) at a flat rate of 15%; and it is:

Resolved, That the following actions be taken on Diocesan Assessment Relief Requests as indicated:

The Episcopal Church

Summary of Assessment Reductions

Granted

1-Oct-25

Diocese	Diocesan Income	Exemption	2025 Covenant Commitment	2025 Rate	Requested Commitment	Requested Rate	Amount Waived	% Waived
1 Albany	\$1,129,237	\$ (200,000)	\$139,386	15.0%	\$74,339	8.0%	\$(65,047)	47%
2 Colombia Dominican Republic	\$383,020	\$ (200,000)	\$ 27,453	15.0%	\$2,000	1.1%	\$(25,453)	93%
3 Republic	\$845,137	\$ (200,000)	\$ 96,771	15.0%	\$-	0.0%	\$(96,771)	100%
4 Florida	\$2,465,150	\$ (200,000)	\$339,773	15.0%	\$ 266,516	10.8%	\$(73,257)	22%
5 Navajoland	\$328,888	\$ (200,000)	\$ 19,333	15.0%	\$2,333	1.8%	\$(17,000)	88%
6 New Jersey Southwest	\$4,563,671	\$ (200,000)	\$654,551	15.0%	\$ 500,000	11.0%	\$(154,551)	24%
7 Florida	\$3,976,805	\$ (200,000)	\$566,521	15.0%	\$ 416,521	10.5%	\$(150,000)	26%

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Adopted on: October 21, 2025

FIN 019 Becoming Beloved Community 2025 Approval

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Joint Finance Committee of Executive Council, meeting on-line on October 1, 2025 and at Kanuga Conference Center, Hendersonville, North Carolina from October 20 to 21, 2025 approve and recommend for approval by the Executive Council, authorization of the following distributions, as recommended by the Becoming Beloved Community Grants Committee.

SEED Grants (\$7,500 each)

Episcopal Church of the Epiphany Newton,

\$ 7,500.00

Western North Carolina:

Multicultural Center - To revive its Multicultural Center after a hiatus caused by Hurricane Helene. The renewed center will offer Spanish and English language and music lessons, pastoral care, and community organizing, while expanding to include a playground, picnic area, and support for families with autistic children and Laotian community members.

Church of the Holy Nativity, Baltimore, Maryland: *The Holy*

\$ 7,500.00

Nativity Pauli Murray Episcopal Learning Center - To provide inclusive, justice-centered early childhood education in partnership with local schools. Honoring Rev. Dr. Pauli Murray's legacy, the center will serve as both a feeder program for elementary schools and a ministry of reconciliation, aiming to address educational inequities and foster systemic change within the community.

Saints Andrew & Matthew, Wilmington, Delaware:

\$ 7,500.00

NOURISH and the Sunny Day Fridge - Provide medically tailored groceries to patients and families managing sickle cell disease and support services that increase healthy food literacy, transform habits and reduce food insecurity.

Mother of the Savior Church, Dearborn, Michigan:

\$ 7,500.00



Interfaith Emotional and Spiritual Care Center - To expand the Interfaith Emotional and Spiritual Care program into Episcopal congregations, deepening partnerships across faiths to support healing and reconciliation. The initiative equips Arab and Middle Eastern participants with tools for trauma recovery, nonviolent conflict resolution, and peer support, while fostering solidarity across cultural and religious divides.

Subtotal **\$ 30,000.00**

IMPACT Grants

Christ Church Episcopal, Norcross, Atlanta:

\$ 15,000.00

Sacred Stories - Sacred Stories confronts the intertwined injustices of racism, xenophobia, and homophobia by amplifying the voices of LGBTQ+ immigrants and people of color long silenced in the church. Through truth-telling and storytelling, it moves congregations from acknowledgement to reconciliation, embodying God's call to justice and Beloved Community.

The Episcopal Diocese of the Central Gulf Coast:

\$ 15,000.00

The Africatown Truth and Repair Initiative - To develop curriculum and other educational programs to share the story of a historic community within the city limits of Mobile, Alabama, which was formed following the Civil War by a group of Africans who had been transported in the last known shipment of enslaved persons to the U.S. on the slave ship Clotilda.

The Episcopal Diocese of Iowa:

\$ 15,000.00

Iowa Freedom School - To develop, pilot, and share a Freedom School model for middle school students in the tradition of the 1964 Mississippi Freedom Summer Schools that saw education as essential for social change. The curriculum and pilot is being developed by a diverse group of partners in response to a series of state laws limiting an honest teaching of our racial history in grades K-12, banning books, and removing diversity, equity, and inclusion offices and programming in public schools and universities.

Grace Episcopal Church Massies Mill, Southwestern Virginia:

\$ 15,000.00

Migrant Farmworker Health Initiative - In partnership with Central Virginia Farmworkers Initiative, provide health screenings in the surrounding



Migrant Farm Communities and transportation and interpretation services for medical and dental appointments. Continue to provide a safe gathering place with wireless internet access, restroom facilities, and other resources to farmworkers who otherwise have very limited accommodations and add laundry services.

Holy Companion Episcopal Church, Colorado:

\$ 10,000.00

Interfaith Center - To continue to develop and strengthen a new coalition of leaders from Christian, Muslim, Jewish, and Unitarian communities to model faith-rooted civic collaboration while working on gaining 501C3 status. Grounded in Episcopal values of justice and inclusion, the coalition seeks lasting systemic change through shared power, equitable space, and a sustained movement toward Beloved Community in an area long marked by racial discrimination and religious exclusion.

St. Peter's Episcopal Church Lebanon, Indianapolis:

\$ 15,000.00

Growing Common Ground Farm - To expand an existing youth program focused on addressing food insecurity, cultivating leadership across diverse backgrounds, and promoting cross-cultural understanding through sustainable agriculture. Growing Common Ground is a partnership between St. Peter's Lebanon and Mother Love's Garden (MLG), an Indianapolis based Black Independent Urban Garden. The grant will fund rural youth to visit urban grower areas and participate in rural-urban exchanges to build technical competencies and foster empathy and understanding among youth, bridging urban and rural perspectives and equipping young people with the confidence to lead within their own communities and beyond.

St. Paul's Episcopal Church, Kansas City, West Missouri:

\$ 10,000.00

Culinary Futures - To expand the church's partnership with the Culinary Futures Workforce Development Program, which trains individuals for careers in the culinary arts while preparing over 500 nutritious meals each day in the Nourish KC Community Kitchen. Equips students most of whom are from historically marginalized communities with industry-recognized skills, hands-on training, and direct pathways into stable employment.

Grants totaling: \$125,000



Subtotal **\$ 95,000.00**

TOTAL GRANTS **\$125,000.00**

EXPLANATION

These grants were created by General Convention to catalyze the Episcopal Church's work of racial healing, reconciliation, and justice. They are designed to build capacity and deepen engagement across the four quadrants of the Becoming Beloved Community Labyrinth:

- Telling the Truth about our Churches and Race
- Proclaiming the Dream of Beloved Community
- Practicing Jesus' Way of Healing and Reconciliation
- Repairing the Breach in Institutions and Society

Review Process

The BBC Grants Committee, comprised of clergy, lay leaders, a bishop, and staff from the Episcopal Church, carefully reviewed applications from across the church. Additionally, a wider group of independent reviewers read and scored every application, with at least two independent reviewers assigned to each grant. Recommendations reflect this multi-layered discernment process, ensuring that funded projects are aligned with churchwide priorities and represent a diverse community cross-section.

The applications reflect the creativity, courage, and commitment shown by every applicant and have selected projects that demonstrate the greatest potential for impact, collaboration, and replicability. The recommended grants are being offered by:

The Rev. Lester Mackenzie
Chief of Mission Program

The Ven. Miguel Bustos
Chief of Mission Program

The Rev. Shaneequa Brokenleg
Staff Officer, Racial Reconciliation/Interim
Indigenous Missioner

Amanda Fulton
Mission Program Coordinator, Justice
Initiatives

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Adopted on: October 20, 2025

FIN 020 Trust Fund # 1356 – Alexander Ector Orr Memorial Fund (2025)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That Trust Fund # 1356, The Alexander Ector Orr Memorial Fund (2025), be established as a trustee-type fund, the income of which is applied for educational purposes in Anvik, Alaska.

EXPLANATION

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Adopted on: October 20, 2025

FIN 021 Trust Fund #1357, St. Peter and All Saints – Morris Bequest (2025)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That Trust Fund # 1357, St. Peter and All Saints – Morris Bequest, be established as an investment account for St. Peter and All Saints Episcopal Church in Kansas City, MO, which may withdraw principal and/or income upon request, and may add to the principal at its discretion.

EXPLANATION

Trust Fund #1357, St. Peter and All Saints – Morris Bequest (2025)

This fund was established with \$400,000 from the Morris Bequest as an investment account by St. Peter and All Saints Episcopal Church in Kansas, MO. This is a custodial-type fund, meaning that DFMS is not trustee for these funds but as custodian is providing the owner (St. Peter and All Saints Episcopal Church in Kansas City, MO) with access to investment management through the DFMS endowment. The owner may add to or withdraw principal funds at its discretion.

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Adopted on: October 20, 2025

FIN 022 Trust Fund #1358, Hope in the Desert Episcopal Church Investment Fund (2025)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That Trust Fund # 1358, Hope in the Desert Episcopal Church Investment Fund, be established as an investment account for Hope in the Desert Episcopal Church in Albuquerque, NM, which may withdraw principal and/or income upon request, and may add to the principal at its discretion.

EXPLANATION

Trust Fund #1358, Hope in the Desert Episcopal Church Investment Fund (June 2025)

This fund was established with \$25,000 as an investment account by Hope in the Desert Episcopal Church in Albuquerque, NM. This is a custodial-type fund, meaning that DFMS is not trustee for these funds but as custodian is providing the owner (Hope in the Desert Episcopal Church in Albuquerque, NM) with access to investment management through DFMS endowment. The owner may add to or withdraw principal funds at its discretion.

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Adopted on: October 20, 2025

FIN 023 Trust Fund #1359, The Puett Emergency Fund (2025)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That Trust Fund # 1359, The Puett Emergency Fund (2025), be established as an investment account for Episcopal Church of the Holy Comforter in Burlington, NC, which may withdraw principal and/or income upon request, and may add to the principal at its discretion.

EXPLANATION

Trust Fund #1359, The Puett Emergency Fund (2025)

This fund was established with \$71,584.86 as an investment account by Episcopal Church of the Holy Comforter in Burlington, NC. This is a custodial-type fund, meaning that DFMS is not trustee for these funds but, as custodian, is providing the owner (Episcopal Church of the Holy Comforter, Burlington, NC) with access to investment management through DFMS endowment. The owner may add to or withdraw principal funds at its discretion.

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Adopted on: October 20, 2025

FIN 024 Trust Fund #1360, The Goodale Scholarship Fund (2025)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That Trust Fund # 1360, The Goodale Scholarship Fund (2025), be established as an investment account for Episcopal Church of the Holy Comforter in Burlington, NC, which may withdraw principal and/or income upon request, and may add to the principal at its discretion.

EXPLANATION

Trust Fund #1360, The Goodale Scholarship Fund (2025)

This fund was established with \$78,074.84 as an investment account by Episcopal Church of the Holy Comforter in Burlington, NC. This is a custodial-type fund, meaning that DFMS is not trustee for these funds but, as custodian, is providing the owner (Episcopal Church of the Holy Comforter, Burlington, NC) with access to investment management through DFMS endowment. The owner may add to or withdraw principal funds at its discretion.

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Adopted on: October 20, 2025

FIN 025 Trust Fund #1361, St. Michael's Anglican Parish, Ridgecrest, California (2025)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That Trust Fund # 1361, St. Michael's Anglican Parish, Ridgecrest, California, be established as an investment account for St. Michael's Anglican Parish in Ridgecrest, CA, which may withdraw principal and/or income upon request, and may add to the principal at its discretion.

EXPLANATION

Trust Fund #1361, St. Michael's Anglican Parish, Ridgecrest, CA (2025)

This fund was established with \$40,000 as an investment account by St. Michael's Anglican Parish in Ridgecrest, CA. This is a custodial-type fund, meaning that DFMS is not a trustee for these funds but, as custodian, is providing the owner (St. Michael's Anglican Parish in Ridgecrest, CA) with access to investment management through the DFMS endowment. The owner may add to or withdraw principal funds at its discretion.

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Adopted on: October 21, 2025

FIN 026 Clergy Housing Allowances - 2026

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That a portion of the total compensation paid to each clergy employee for calendar 2026 shall be designated to be a Housing Allowance within the meaning of Section 107 of the Internal Revenue Code; and be it further

Resolved, That the Executive Council designates as Housing Allowances for 2026 made pursuant to Internal Revenue Code Section 107 and Internal Revenue Service Regulations S1.107 the amounts requested by clergy employees of the DFMS and presented to the Chief Financial Officer as indicated in the attached list.

EXPLANATION

The Internal Revenue Code and Internal Revenue Service Regulations require that Clergy Housing Allowances must be approved by the governing body. Requests for Housing Allowances are considered as soon as practicable, either by the Executive Council or by the Executive Committee, on behalf of the Executive Council.

A Housing Allowance may not exceed 100% of the annual cash salary of the clergy receiving such allowance. The requested amounts on the attached list are within the salary limitations. Individual salaries are available for review in the Treasurer's Office.

Payroll Name	2026 Requested Housing Allowance	2025 Requested Housing Allowance
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	

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Adopted on: October 20, 2025

FIN 027 2026 Dividend Rates for the DFMS Trust Fund Portfolios

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the dividend rate for 2026 for the DFMS Trust Fund portfolios available to support the operating budget of DFMS be set at \$1.21 per share based on 4.5% of the average year-end market values of the portfolio for the five years ending 2024; and be it further

Resolved, That the dividend rate for 2026 for Trust Funds in the DFMS Endowment Portfolio that are not available to support the operating budget of the DFMS, including Custodial Trust Funds managed for third parties, be set at \$1.21 per share based on 4.5% of the average year-end market values of the portfolio for the five years ending 2024.

EXPLANATION

The dividend rate is intended to preserve the value of the Trust Fund portfolios after giving effect to annual price inflation. Year-end market values of the portfolio and annual dividends per share since 2012 are set forth below:

Year Ending 12/31	Endowment Year-End Market Value	Year-End Value per Share	5-year average \$ Value per Share	Dividend per Share
2012	\$311,816,630	\$19.30	\$18.876	\$1.09
2013	\$364,917,861	\$22.32	\$17.919	\$0.94
2014	\$374,505,896	\$22.56	\$19.346	\$0.89
2015	\$355,969,542	\$21.29	\$20.654	\$0.96
2016	\$365,914,910	\$21.32	\$21.355	\$1.01
2017	\$448,897,531	\$24.34	\$22.364	\$1.03
2018	\$415,504,874	\$21.54	\$22.208	\$1.06
2019	\$506,305,956	\$25.06	\$22.708	\$1.11
2020	\$587,473,257	\$28.79	\$24.209	\$1.11
2021	\$649,394,321	\$30.27	\$26.000	\$1.13
2022	\$518,919,302	\$23.33	\$ 25.798	\$1.21
2023	\$582,386,203	\$25.66	\$26.662	\$1.30
2024	\$609,789,445	\$27.16	\$27.043	\$1.28



2025				\$1.33
2026				\$1.21

The long-term target investment return for the Endowment comprising the Trust Funds is 7.5%, which is in line with the Endowment’s average annual return over the last 10 years. The Bloomberg Consensus Inflation (CPI) forecast for 2026 is 3.2%, which implies a dividend rate net of inflation of 4.3%. A dividend rate of 4.5% is acceptable given that inflation is expected to decline in subsequent years.

The recommended dividend and supporting calculations are consistent with standards of prudent fiduciary conduct in the management of endowment funds and with general practice among university, foundation, and other non-profit endowment funds.

In making this recommendation, the following factors were considered in accordance with the New York Prudent Management of Institutional Funds Act:

1. The Endowment is intended to be of perpetual duration, and the need to support current operations must be balanced against the need for funds in the future.
2. Revenue and expense expectations, general economic conditions, and past practice support appropriating funds from the Endowment.
3. The applicable gift instruments allow income from trust funds that support the operating budget of the DFMS to be used for operations.
4. Current investment market conditions support using past market values as the basis of the dividend draw rate.
5. Price inflation has a direct impact on the purchasing power of the Endowment. A number of economic factors support inflation expectations of more than 3% in 2026, while the DFMS anticipates 3.5% in actual cost inflation, driven largely by salary and benefits expenses.
6. The Endowment has generated a 7.4% average annual return over the past 10 years.
7. Management has implemented restructuring and cost reduction programs that allow the DMFS to balance its budget at a 4.5% dividend payout rate.
8. The draft 2026 Budget reviewed by the Joint Budget Committee and recommended to FIN for approval assumes the proposed 4.5% dividend payout rate.

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Adopted on: October 21, 2025

FIN 028 TF #809 – Theological Education for Latin America and the Caribbean (1977); & TF #1156 – Iowa Fund for Support of Theological Education for the Caribbean (2017)

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Canons to the Presiding Bishop for Ministry Within the Episcopal Church and for Ministry Beyond The Episcopal Church be authorized to use income distributed during 2025 from Trust Fund #809 and Trust Fund #1156 in the amount set forth on the attached schedule for educational and theological programs, as recommended by the Commission on Theological Education for Latin America and the Caribbean (CETALC) gathered in Brazil during August 5-8, 2025, and be it further

Resolved, That disbursement of funds will be conditioned upon the receipt of appropriate documentation to secure financial and operational accountability acceptable to the Canons and the Chief Financial Officer; and be it further

Resolved, That any funds not allocated during 2025 be reinvested.

EXPLANATION

The Commission on Theological Education for Latin America and the Caribbean is charged with the responsibility of reviewing all requests for funding from the income of Trust Fund #809 (fund established with the proceeds from the sale of the Seminary property in Puerto Rico) and of Trust Fund #1156 (funds established with approximately \$339,000 by closing the DFMS short-term Custodial Account 20-101-2711-2932). The Commission carefully reviews and respectfully submits its recommendations to Executive Council for review and approval once each year.

Trust Funds #809 and #1156 are expected receive dividends totaling approximately \$533,000 in 2025, which exceeds the amount requested for distribution in the attached schedule.

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Adopted on: October 21, 2025

FIN 029 EC CCSR Shareholder Engagement Work for 2025-2026

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Executive Council approves the 2025-2026 shareholder engagement work plan of the Executive Council Committee on Corporate Social Responsibility (CCSR) as set forth below.

EXPLANATION

Socially Responsible Investment and Shareholder Engagement Advocacy Plan 2025-2026

D = dialogue | R = potential resolutions | *Rust* = New Company | Underlined = DFMS lead

Corporate social responsibility and socially responsible investing are important ways The Episcopal Church carries out its public witness. Through the activities of DFMS (Domestic and Foreign Missionary Society) staff, consultants, and with recommendations by the Committee on Corporate Social Responsibility to the Executive Council, The Episcopal Church aims for investments that reflect the values General Convention and Executive Council have set through policy statements and resolutions. The work of socially responsible investment also aligns with and reinforces the broader work of public policy advocacy that the Office of Government Relations and Episcopal Church representative to the United Nations carry out.

The priority areas of The Episcopal Church engagement will continue to be:

- Anti-Poverty
- Immigration and Refugees
- Racial Reconciliation and Justice
- Climate and Environment
- Human Rights and Peacebuilding

By aligning our focus in all these areas, The Episcopal Church will have a greater impact across sectors. The work laid out here is complemented by partners including the Interfaith Center on Corporate Responsibility as well as Mercy Investments and Heartland, who work with DFMS as consultants. Across all these topic areas, DFMS will push for transparency and accountability by corporations, including advocating for lobbying disclosures. All advocacy will continue to uphold the right of investors to engage in socially responsible investing.

In addition to the engagements and resolutions listed below, CCSR will work with consultants to implement a weapons screen (GC81, 2024-[A030](#)). This will need to be developed and then will likely be implemented over several years.



DFMS receives many opportunities to sign onto letters that address corporate social responsibility on issues related to church policy. DFMS leadership, especially the CFO and the chief of Public Policy and Witness, will determine whether to sign such letters after consultation with the director of Government Relations, who will also advise on investor letters addressed to the administration or Congress.

CCSR regularly reviews the companies on the DFMS No-Buy Lists and may recommend the addition or deletion of companies there listed based on the criteria of each investment screen as determined by General Convention and /or Executive Council. The No-Buy lists include tobacco, private prisons, military defense contracting, fossil fuels, and companies with connection to human rights abuses.

Most of this work will be managed by Mercy Investment Services, with the exception of the work on conflict-affected and high-risk areas, which is managed by Heartland Initiative. CCSR members can continue to monitor other issues and raise action for committee and Executive Council approval.

In the year ahead, CCSR members will work to educate the church about leveraging investments to align with values and the opportunity that socially responsible investments presents to individuals, parishes, and dioceses.

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Anti-Poverty

The Episcopal Church seeks to end poverty and address human suffering, promoting access to healthcare, a strong social safety net, and a just tax system for all. The Episcopal Church seeks to effect change in gun violence through the practices of shareholder advocacy to minimize lethal and criminal uses of their products, and be it further

Issue: Access to Health Care

Objectives	2025 Company Engagements	2026 Company Engagements
Improve transparency and reporting on current practices and how they impact access to health services; advocate for implementation of best practices and industry standards, and push for the development of human rights policies and implementation through impact assessment practices.	Sign-on letters as appropriate	United Health (healthcare) D Bristol Meyers Squibb (healthcare) D

Issue: Worker Rights

Objectives	2025 Company Engagements	2026 Company Engagements
- Engage companies to pay a living wage, ensuring workers can afford a decent standard of living, particularly in traditionally low-wage sectors. - Raise workplace safety concerns, including those related to production quotas, the use of		Dollar General (retail) R Dollar Tree (retail) D



technology, and the risk of workplace violence.		
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Issue: Gun Safety

Objectives	2025 Company Engagements	2026 Company Engagements
- As a public health issue, engage gun manufacturers to adopt more smart technologies for weapons; engage retailers to restrict which weapons they sell and under what conditions; engage both to adopt the Sandy Hook Principles--which protect the rights of gun ownership and the rights of citizens to be safe and secure--and to report on their lobbying activities and expenses for gun rights. - Determine when to invest in gun manufacturers to change corporate behavior. - Engage related industries such as insurers on how they are managing the impact of the epidemic of gun violence in the U.S.	Travelers (insurance)	Travelers (insurance) D Hartford (insurance) D



Immigration and Refugees

The Episcopal Church supports policies and practices that assist communities in serving migrants, addresses global migration, and protects the rights of migrants.

Issue: Immigration/Refugees/Migration

Objectives	2025 Company Engagements	2026 Company Engagements
Engage companies that employ migrant workers (documented and undocumented) in their workforce or supply chains on issues such as fair treatment, adequate health care, wage theft, job training, child labor, or other labor/human rights issues	CocaCola (beverage) D PepsiCo (food/beverage) R Procter and Gamble (consumer goods) D	CocaCola (beverage) D PepsiCo (food/beverage) R Procter and Gamble (consumer goods) D
Divest from private prisons participating in immigrant detention. Seek to address human rights policies, implementation, and disclosure with implementation metrics.	Sign-on letters as appropriate	Sign-on letters as appropriate
Engage companies on advocating for just immigration reform in the United States.	Sign-on letters as appropriate	Sign-on letters as appropriate
Engage companies to promote pro-immigrant public policies and address the impact of anti-immigrant policies and mass deportations.		Tyson Foods (D)



Racial Reconciliation and Justice

The Episcopal Church respects the dignity of all people and seeks to end systemic racism, reform the criminal justice system, and enhance voting rights.

Issue: Rights of Indigenous Cultures and Communities

Objectives	2025 Company Engagements	2026 Company Engagements
• Improve transparency and reporting on current practices, implementation of best practices and industry standards, human rights impact assessments, and community development and impacts. • Assess company risks related to conflict minerals and the environmental and public health impacts. • Engage companies to ensure free prior informed consent (FPIC) is used in siting projects and obtaining community consent during entire project with a special focus on Indigenous communities. • Encourage community engagement in water-stressed areas, including mitigating impact on the most vulnerable, including women, Indigenous people, and people who are impoverished.	Albermarle (mining) (11-26-24) D	Albermarle (mining) D Ford (automotive) D

Issue: Diversity, Equity, and Inclusion

Objectives	2025 Company Engagements	2026 Company Engagements
• Engage companies to understand how they are	Sign-on letters as appropriate	Ford (automotive) D Target (retail) D



addressing income inequalities, racial disparities, and other human capital issues.		Walmart (retail) D
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Climate and Environment

The Episcopal Church considers the climate crisis a defining issue of our time and urges accelerated action to reduce carbon emissions, phase out fossil fuels, invest in renewable energies, transition to a sustainable energy economy in a just way, and protect human rights and biodiversity.

Issue: Stewardship of Water

Objective – Water and healthy communities	2025 Company Engagements	2026 Company Engagements
Engage companies on science-based water stewardship targets and the human right to water, in their operations and their supply chains. Focus on Ceres’ “Valuing Water” initiative.	Campbell’s (food) Constellation (alcohol) Coca-Cola (food/beverage) Monster (beverage)	Campbell’s (food) D Constellation (alcohol) D Coca-Cola (food/beverage) D <u>Monster (beverage) D</u>

Issue: Climate Change

Objectives – Climate Change and a Healthy Environment	2025 Company Engagements	2026 Company Engagements
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Engage companies to adopt science-based targets for reducing greenhouse gas emissions; adopt technologies to monitor and reduce methane emissions; adopt new and cleaner energy technologies; promote efficiency; promote transparency in reporting; and protect consumers, particularly low-income consumers.	Ameren (utility) Delta (airline) Duke Energy (utility)	Ameren (utility) D Delta (airline) D Duke Energy (utility) D
Engage companies to improve public disclosure and transparency in reporting. Request information about current and future company operations and products including company plans to manage carbon asset risk and comply with a regulatory scenario that holds global temperature rise below a 1.5/2-degree Celsius threshold.	NextEra (energy) Nucor (steel) Commercial Metals (steel) Steel Dynamics (steel)	NextEra (energy) D Nucor (steel) D Commercial Metals (steel) D Steel Dynamics (steel) D
Engage companies to accelerate progress toward a net-zero future in the food sector, focused on Ceres' Food Emissions 50.	Darden (Restaurant) Ingredion (Food & Bev) U.S. Foods	Darden (Restaurant) D Ingredion (Food/Beverage) D U.S. Foods (Food/Beverage) D



Engage financial institutions to ensure commercial lending and investment policies address socioeconomic and environmental concerns, particularly climate change, water stewardship, pipelines, and financing in their lending practices.	AIG (insurance) JPMorgan Chase (banking) PNC (banking)	AIG (insurance) D JPMorgan Chase (banking) D PNC (banking) D
Engage companies to ensure positive community impact of company operations on society; and that local economy and environmental concerns are appropriately assessed and transparently reported (sustainability reports), including environmental justice concerns and operational impacts on the most vulnerable, including women, Indigenous people, and people who are impoverished.	<u>Chewy (pet supplies) (1-24-25) D</u> Albermarle (mining) (11-26-24) D	Albermarle (mining) D Ford (automotive) D

Issue: Climate Lobbying

Objective – Lobbying and Political Spending Disclosure	2025 Company Engagements	2026 Company Engagements
- Engage companies to address political spending, lobbying and trade association contributions, and other financial support, such as political ads and trade association memberships to climate issues. - Ensure companies align public pronouncements with	UPS (shipping) D Duke Energy (utility) R NextEra (energy) R	Duke Energy (utility) D NextEra (utility) D



expenditures in lobbying and stated values match lobbying asks about regulation, investments and that asks are in line with transforming industries that are harmful.		
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Human Rights and Peacebuilding

The Episcopal Church supports policies and practices that prioritize humanitarian assistance and peacebuilding, promote gender justice, and prevent human rights abuses, working toward reconciliation in the U.S. and around the world.

Issue: Human Rights

Objective - Labor Trafficking in Workplace & Supply Chain	2025 Company Engagements	2026 Company Engagements
Engage companies on efforts to ensure compliance with human rights standards in their own workforce and supply chains, including outsourced labor brokers, requirements in subcontractor contracts, living wage, and worker health and safety.	Coca-Cola (food/beverage) D Delta (airline) D PepsiCo (food/beverage) R United (airline) D Procter and Gamble (consumer goods) D	Coca-Cola (food/beverage) D Delta (airline) D PepsiCo (food/beverage) R United (airline) D Procter and Gamble (consumer goods) D
Oppose surveillance technologies that restrict human rights.		Sign-on letters as appropriate Workshops and events as appropriate
Objectives – Sex Trafficking	2025 Company Engagements	2026 Company Engagements
Engage companies on compliance with best practice standards to mitigate labor trafficking, and child and women sexual trafficking.	Delta (airline) United (airline)	Delta (airline) D United (airline) D



Engage companies to address online child sexual exploitation.	Alphabet (tech) D Meta (tech) R	Alphabet (tech) D Meta (tech) R
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Issue: Conflict-Affected and High-Risk Areas

Note: *All engagements in this objective are supported by Heartland Initiative.*

Objectives	2025 Company Engagements	2026 Company Engagements
- Engage companies with direct or value chain activities in conflict-affected and high-risk regions in areas of civil and/or labor strife or racial disparagement (e.g., Democratic Republic of Congo, Israel/Palestine, Russia, Myanmar, Xinjiang Uyghur Autonomous Region (XUAR), China, U.S./Mexico border) on heightened human rights due diligence processes to help ensure they are not directly or indirectly financially benefiting repressive regimes and/or armed groups or engaged in repressive practices impacting vulnerable populations (e.g., human rights defenders, workers, Indigenous people). - Develop human rights screen for Israel/Palestine and conflict-affected areas such as Burma/Myanmar, Russia, XUAR, Sudan, etc.	Analog Devices (tech) D Booking (travel) D Cisco Systems (tech) D Expedia Group (travel) D Heidelberg (cement) D Hilton (travel) R JPMorgan Chase (banking) R Keysight (tech) D Marriott (travel) D	Analog Devices (tech) D Booking (travel) D Cisco Systems (tech) D Expedia Group (travel) D Hilton (travel) D Marriott (travel) D Microsoft (tech) D



Approximate Proposal Requests to be Filed in 2025-2026 Shareholder Season

Note: All shareholder resolution language approved by Executive Council is subject to review by the Securities Exchange Commission (SEC) in accordance with SEC standards developed from time to time, if the company requests such review. Accordingly, any resolution approving a text will include language such as “such text or its substantive equivalent” to accommodate adjustments to the text necessary to meet any SEC requirements in any instance after such review. Further, some resolution texts are refined after consultation with ecumenical partners in the Interfaith Center for Corporate Responsibility prior to the filing deadlines. These refinements are not substantive, but pertinent to the individual targeted companies.

A handwritten signature in blue ink, appearing to read "Molly James". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

The Rev. Molly James

Interim Executive Officer

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America



Adopted on: October 20, 2025

GO 005 Resolution Regarding the Episcopal Church Building Fund's Amended and Restated Certificate of Incorporation

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, the Executive Council, meeting at Kanuga, Hendersonville, NC, on October 20 and October 21, 2025, pursuant to the Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America's authority under the Restated Certificate of Incorporation of the Episcopal Church Building Fund, approves the amendments made to the Restated Certificate of Incorporation by action of the Board of Trustees of the Episcopal Church Building Fund on September 17, 2025.

EXPLANATION

The Episcopal Church Building Fund ("ECBF") was established by General Convention in 1881 and incorporated as a New York not-for-profit corporation for the charitable, religious, and educational purpose of (i) making loans and grants for the acquisition, construction, maintenance, repair, replacement, and other improvement of Episcopal churches, rectories, and parochial buildings, and (ii) refunding or paying indebtedness in pursuit of the acquisition, construction, maintenance, repair, replacement, and other improvement of Episcopal churches, rectories, and parochial buildings. On January 29, 2007, ECBF amended its Certificate of Incorporation and expanded its corporate purpose to include providing consultation and programmatic services to dioceses, parishes, and congregations of The Episcopal Church appertaining to congregational development and church facilities.

The proposed Amendment to the Restated Certificate of Incorporation permits the ECBF to make loans or gifts to The Episcopal Church, its dioceses, parishes, and congregations, and the Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America, to be used for the purpose of congregational development and/or church planting. This amendment continues ECBF's and The Episcopal Church's shared mission by funding congregational development and/or church planting through the DFMS or Episcopal dioceses, parishes, and congregations.

The Rev. Molly James



Interim Executive Officer
The Domestic and Foreign Missionary Society
of the Protestant Episcopal Church in the United States of America



Adopted on: October 21, 2025

GO 006 Fall 2025 New Episcopal Communities Grants

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, That the Executive Council, meeting from October 20-21, 2025, approve and authorize the following, as recommended by The Advisory Group on Church Planting and Revitalization and reviewed and recommend by the Joint Standing Committee on Governance and Operations of The Episcopal Church. As allocated by General Convention 2024 resolutions A045 and A046, 31 grants will be funded to the amount of \$394,994 (A045) and \$47,172 (A046).

EXPLANATION

Discernment Grants (up to \$5,000 each)

Comunidad de la Gracia – Diocese of Idaho (\$5,000 from A046)

A Spanish-speaking discernment community forming around shared meals, prayer, and neighborhood engagement with Latino families in Boise. Guided by local lay leaders and diocesan support, the ministry is exploring new ways to proclaim the Gospel in culturally resonant and inclusive ways.

New Campus Ministry Collaboration – Diocese of Long Island (\$5,000 from A045)

A joint discernment effort among several parishes and diocesan leaders to establish an Episcopal presence across multiple university campuses. The collaboration seeks to listen to student needs, identify lay and clergy leadership, and test innovative approaches for spiritual community in academic settings.

Sacred Paths – Diocese of California (\$5,000 from A046)

An emerging ministry exploring new ways of gathering spiritual seekers and those unaffiliated with traditional church life through contemplative outdoor worship, interspiritual dialogue, and creation-centered formation. Rooted in the Bay Area's diverse cultural landscape, Sacred Paths seeks to discern how The Episcopal Church can meet people where they already experience the sacred.

St. Thomas' Dinka Worshiping Community – Diocese of Iowa (\$5,000 from A046)

A community discerning how to grow worship, pastoral care, and leadership among Dinka-speaking Episcopalians and their families in Iowa. Building on strong lay leadership and cultural heritage, the group is exploring bilingual liturgy, community outreach, and formation that bridges generations.



Seed Grants (up to \$30,000 each)

Emmaus Twin Cities – Diocese of Minnesota (\$20,000: \$5,000 from A045 and \$15,000 from A046)

A thriving young-adult and neighborhood-based ministry centered on hospitality, shared meals, and contemplative worship. Emmaus Twin Cities continues to grow its leadership team and deepen community engagement as it moves toward long-term stability.

Fe en los Vecindarios – Diocese of Cuba (\$30,000 from A045)

A growing ministry rooted in neighborhood solidarity and Gospel service. Fe en los Vecindarios equips lay leaders to address local needs through education, worship, and community partnerships that witness to God's hope amid economic hardship.

Holy Companion – Diocese of Colorado (\$20,000 from A045)

An emerging network of house-based and outdoor gatherings cultivating authentic connection, prayer, and service. Holy Companion emphasizes formation and inclusion, creating accessible spaces for people who might not otherwise find a home in traditional parish life.

Iglesia San Andrés – Diocese of Western Kansas (\$15,000 from A045)

A growing Latino ministry cultivating faith, belonging, and mutual support among families in rural western Kansas. San Andrés is developing lay leaders, deepening formation opportunities, and creating new partnerships with neighboring congregations to sustain its mission and community impact.

Iglesia San Pablo – Diocese of Western Kansas (\$15,000 from A045)

An emerging Spanish-speaking congregation building bridges of faith and service in its local community. San Pablo continues to form leaders, expand bilingual worship, and collaborate with nearby Episcopal ministries, reflecting the Church's ongoing commitment to culturally rooted and inclusive evangelism.

St. Lucy's – Diocese of California (\$20,000 from A045)

A revitalizing community discerning new ways to serve its diverse neighborhood through worship, service, and relational outreach. St. Lucy's is strengthening local leadership and expanding lay participation as it grows into a sustainable and vibrant Episcopal presence.

Growth Grants (up to \$30,000 each)

All Saints' Mission, Amsterdam - Convocation of Episcopal Churches in Europe (\$17,142 from A045)

A growing English- and multilingual-speaking community in Amsterdam deepening its Episcopal identity and presence among international residents and seekers. The congregation is strengthening leadership, expanding worship participation, and building partnerships with local organizations as it develops sustainable rhythms of ministry in a global city.

Espíritu Santo - Diocese of Texas (\$17,142 from A045)



A vibrant Spanish-speaking congregation strengthening its mission among Latino families in the region. Espíritu Santo is deepening formation and worship life while expanding leadership development and community outreach, embodying the bilingual and bicultural spirit.

Hope & Bread – Diocese of Western Oregon (\$17,142 from A045)

A new community centered on shared meals, prayer, and service among people experiencing food insecurity and social isolation. Hope & Bread embodies the Gospel through hospitality—building relationships across cultural and economic divides while forming a worshipping community grounded in justice, compassion, and mutual care.

Journey Church - Diocese of Missouri (\$17,142 from A045)

A creative and welcoming community that gathers across traditional and digital spaces to reach people exploring faith for the first time. Journey Church is developing deeper structures for lay leadership, discipleship formation, and sustainable financial stewardship as it continues to grow in size and spiritual maturity.

SpiritBound Faith - Diocese of New Hampshire (\$17,142 from A045)

A digital-first Episcopal community offering inclusive worship and formation opportunities for people across geographic and cultural boundaries. SpiritBound Faith is expanding its leadership team, refining online liturgical practices, and creating new pathways for belonging and discipleship in a fully virtual environment.

St. Brigid's Episcopal Church, Oceanside - Diocese of San Diego (\$17,142 from A045)

Rooted in Celtic spirituality and coastal community life, St. Brigid's blends ancient liturgy with modern outreach to reach unchurched neighbors. The congregation is focusing on lay leadership training, community partnerships, and sustainable structures to support its growing membership.

Trinity–Trinidad Episcopal Church, Haverhill - Diocese of Massachusetts (\$17,142 from A045)

A bilingual, multicultural congregation expanding its outreach to immigrant and Latino families in the Merrimack Valley. Trinity–Trinidad is focusing on leadership development, bilingual formation, and neighborhood engagement that reflect the unity and vitality of a shared Episcopal identity.

The Well, Bowie - Diocese of Washington (\$17,142 from A046)

A growing, multiethnic Episcopal community centered on relationships, service, and creative worship. The Well is investing in leadership training, community partnerships, and outreach that connects new people to the life of faith in accessible and authentic ways.

Harvest Grants (up to \$40,000 each)

Faith Christian Church of India – Diocese of Missouri (\$15,000 from A045)



A vibrant worshipping community rooted in Indian Christian tradition and Episcopal identity. The church is expanding outreach, leadership development, and bilingual formation for immigrant families in Missouri.

Good Courage Farm – Diocese of Minnesota (\$10,000 from A045)

A land-based ministry combining sustainable agriculture, retreat hospitality, and spiritual formation. Good Courage Farm embodies creation care and food justice as expressions of Christian discipleship.

Hālau Wa‘a Episcopal – Honouliuli – Diocese of Hawai‘i (\$15,000 from A045)

A contextual, land-based ministry embodying the Gospel through Hawaiian culture, spirituality, and environmental stewardship. Hālau Wa‘a fosters community through worship, education, and hands-on care for creation.

Mother of the Savior Church – Diocese of Michigan (\$15,000 from A045)

A multilingual, multicultural congregation serving immigrant and refugee families. Mother of the Savior is strengthening lay leadership, pastoral care, and worship that celebrates the diversity of God’s people.

Saint Nino’s, Tbilisi, Georgia – Convocation of Episcopal Churches in Europe (\$15,000 from A045)

An emerging Episcopal community in Tbilisi offering bilingual worship, formation, and hospitality for local and international members. Saint Nino’s provides a spiritual home for Anglicans and seekers in the heart of the Caucasus.

St. Cornelius Episcopal Church – Diocese of Texas (\$10,000 from A045)

A renewing congregation focused on neighborhood connection, bilingual formation, and local service. St. Cornelius is building a sustainable model of parish life that reflects its diverse and growing community.

St. Nicholas Hill Country Episcopal Church – Diocese of West Texas (\$10,000 from A045)

A young and vibrant congregation in Bulverde, TX developing creative worship and strong community ties. St. Nicholas emphasizes lay leadership, intergenerational connection, and service as expressions of joyful discipleship.

St. Stephen’s Episcopal Church – Diocese of Texas (\$10,000 from A045)

A historic parish reimagining its mission through outreach, discipleship, and community partnerships. St. Stephen’s is forming new leaders and cultivating practices of hospitality and evangelism.

St. Thomas Episcopal Church – Diocese of Albany (\$15,000 from A045)

A revitalizing parish expanding outreach and discipleship among young families and new residents. St. Thomas is deepening community engagement through worship, service, and partnerships that strengthen its mission presence in the region.



Sudanese Grace Episcopal Church – Diocese of the Great Lakes (\$15,000 from A045)

A thriving Sudanese congregation worshipping in both Dinka and English, nurturing cross-cultural fellowship and leadership. The community continues to grow its ministries of worship, family support, and outreach to recent immigrants.

The Church at Crossroads (Episcopal) – Diocese of Michigan (\$15,000) from A045

Located in Detroit's Midtown district, The Church at Crossroads is deepening its outreach and worship life in collaboration with students, neighborhood residents, and community partners committed to justice and inclusion.

The Table Episcopal Church – Diocese of Indianapolis (\$10,000 from A045)

A growing missional community welcoming people who have felt disconnected from traditional church life. The Table gathers around inclusive worship, shared meals, and service, cultivating belonging and spiritual renewal.

West Central Abbey – Diocese of Spokane (\$10,000 from A045)

A creative, justice-centered community gathering people for worship, recovery, and service in Spokane's urban core. West Central Abbey continues to expand its partnerships and deepen its commitment to inclusive ministry.

The Rev. Molly James

Interim Executive Officer

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America



Adopted on: October 21, 2025

GO 007 Resolution Regarding the Revised DFMS Document Retention Schedule

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, the Executive Council, meeting at Kanuga, Hendersonville, NC, on October 20 and 21, 2025, approves the Revised DFMS Document Retention Schedule.

EXPLANATION

Since the DFMS Records Retention and Management Policy was approved by Executive Council in 2009, DFMS Records Management and the Archives have continued to refine the Document Retention Schedule, consistent with this policy, to ensure that DFMS is continuing to follow the best practices in the field and remaining in compliance with ever changing rules regarding data security and the privacy of personally identifying information. The Schedule has been revised nine times since 2009 with the latest revision in May 2021. This revision includes changes to retention schedules as underlying law has changed, references to redaction of personal information, and certain retention obligations under federal and state law.

The Rev. Molly James

Interim Executive Officer

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America



Adopted on: October 20, 2025

GO 008 Resolution Adopting Updated DFMS Travel Guidelines

The following is a true copy of a Resolution adopted by the Executive Council.

Resolved, The Executive Council, meeting at Kanuga, Hendersonville, NC, on October 20 and 21, 2025, approves the 2025 revision of the The Domestic and Foreign Missionary Society Guidelines for Official Travel.

EXPLANATION

DFMS periodically updates its travel policies to ensure compliance with relevant state and federal laws and regulations. The 2025 travel policy additionally anticipates the use of a new travel vendor in the near future.

The travel policy can be found here:

<https://extranet.generalconvention.org/staff/files/download/23779>

The Rev. Molly James

Interim Executive Officer

The Domestic and Foreign Missionary Society

of the Protestant Episcopal Church in the United States of America